TRACS User Manual

Print Edition

Last Updated December 5, 2016

Table of Contents

*In an electronic format, you can **Ctrl-Click** on a topic below to jump to that page.*

Overview

The TRACS User Guide contains essential information for the user to make full use of the TRACS system. The instruction guide includes step-by-step instructions for using the TRACS system.

The TRACS User Guide is organized by chapters which correspond to the lessons in the online video-based TRACS Self Paced Courses.

- The **TRACS Basic Course** is covered in chapters 1-10 which walks you through the process of entering a generic project into TRACS from start to finish.
- The **TRACS Advanced Course** is covered in chapters 11-21 which includes additional tools and functionality in the system for advanced users.
- Additional chapters cover other topics such as Legacy Data and User Administrator functions.

Download/Print Instructions:

To download a current "Print Edition" of the TRACS User Guide, visit the TRACS Reference Materials folder on the TRACS Knowledge Management Site (KMS).

****Note: This may take several minutes to open due to the large file size.**

Alternately, to print just a single chapter: Open the online User Guide on the KMS and click on the Book Administration button in the upper left and select "Print this chapter" (or "Print book"). Note: formatting will be best in the print version above. When the document opens, click "Print book" or "Print chapter" (if the print dialogue box does not open, right click on the document and select "Print").

What is TRACS

What is Wildlife TRACS?

Wildlife Tracking and Reporting Actions for the Conservation of Species (TRACS) is the tracking and reporting system used by the U.S. Fish & Wildlife Service (USFWS), Wildlife and Sport Fish Restoration (WSFR) Program to capture conservation and related actions funded by its grant programs. TRACS provides real-time public access to project information, including project descriptions and accomplishments on the public TRACS Conservation Viewer website.

Core Functions & Features

Map-Based

"Spatial adjacency" refers to the ability to organize and view information both horizontally and vertically. TRACS supports spatial adjacency by attributing data geographically via polygons on a map. Information can be viewed across a landscape (in adjacent spaces, e.g. watersheds, counties, species range, etc.) and nested in multiple vertical views (think "zooming out" with a telescope to take in a broader view). Data can be rolled up to the scale of the view. Project polygons overlap spatially and data layers can be separated vertically.

Cloud-Hosted

The federal and the public sides of the system are hosted in the Amazon Web Services (AWS) "cloud" and both the secure federal back-end and the public front-end are accessed via the Web. Cloud-hosting maximizes data accessibility, while providing secure and stable data systems without the infrastructure and maintenance costs of a traditional data center.

Role-Based Security

State system users access the database through a secure, password-protected portal. State administrators designate task specific roles to users (e.g. one user may only be able to view data; another may be able to edit data based on their assigned "role").

Workflow Efficiencies

- TRACS decreases overall grant administration time and costs for all parties. TRACS saves federal and state staff time and money in five ways:

- Data entry directly into the TRACS portal replaces annual written performance reports, thereby reducing redundancy and duplication in data entry;
- TRACS ensures greater accuracy of data entry by having the originators of the data, not third parties, enter it into the system. This means less time in data quality assurance and quality control.
- TRACS significantly reduces reporting effort by providing on-line access to canned reports as well as tools to develop custom reports.
- TRACS maximizes use of web services to share and ingest data, reducing the time and staff needed to enter and manage project data; and
- TRACS spatial platform makes it easier to identify and communicate project locations, relationships, and outcomes.

Collaboration

Whereas WSFR constitutes the largest single conservation program in the nation, its effectiveness is dependent on the ability to collaborate with state, local, tribal, non-governmental, commercial, and landowner partners. To be successful, WSFR must be able to identify and support project sponsors and implementers. TRACS provides both a forum and a platform for communicating priorities, status, funding and effectiveness of WSFR's contribution towards the nation's conservation efforts.

Data Elements

Projects

TRACS captures information about projects. A Project is user defined to describe one or more related actions undertaken by a group of practitioners to achieve specific goals and objectives. A Project is geospatially represented by a polygon(s) independent of scale. Associated data include fields required by WSFR grant program regulations including: need, objectives, results or benefits expected, approach, and estimated costs.

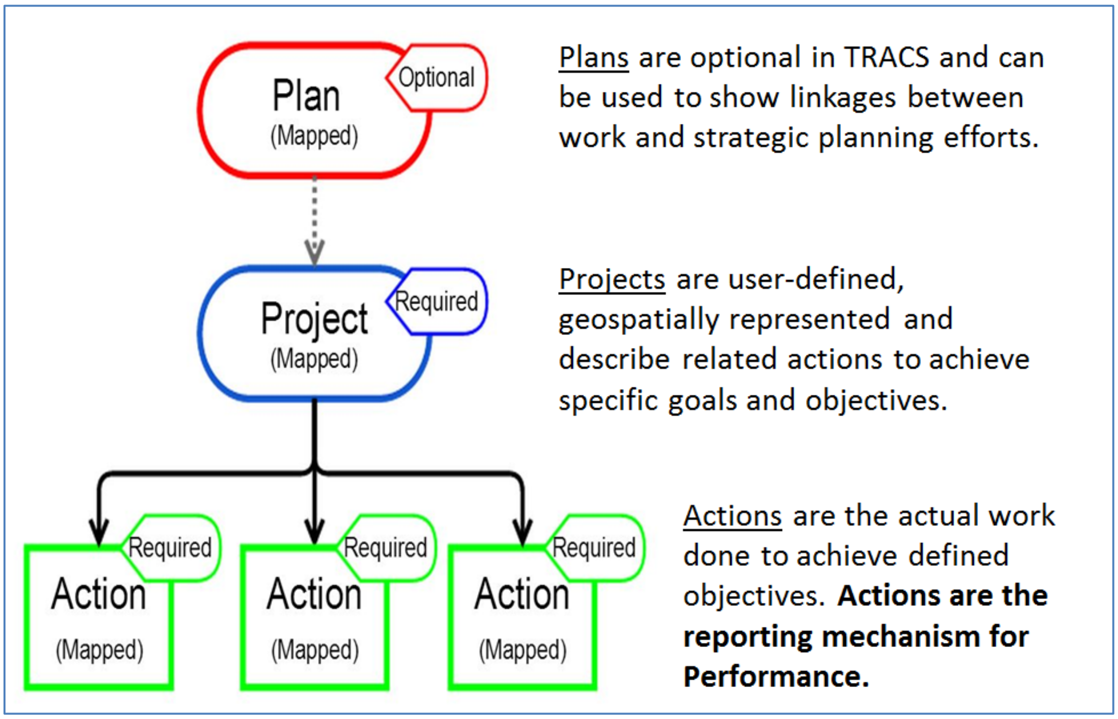
Actions

TRACS captures information about conservation actions. An Action is an intervention undertaken by a project team to reduce threats, capitalize on opportunities, or restore natural species and ecosystems. Actions occur within a Project and are used as the reporting mechanism for grants. An Action is user defined and can be represented spatially by a polygon(s) independent of scale. An action is also described by specific Category, Strategy, and sometimes Activity types.

Plans

TRACS captures information about plans. A Plan is a defined and accepted strategy for achieving specific goals, including conservation of species or habitats within a defined geographic region. It is user defined and could include species management plans, recovery plans, habitat conservation plans, and strategic plans. A Plan is geographically represented by a polygon independent of scale. Plans are optional in TRACS, but they may be helpful to show linkages between work and strategic planning efforts.

TRACS is a **project centric system** and is designed to report grantee conservation efforts as plans, projects and actions.



Message from the Division and Branch Chiefs

The Wildlife and Sport Fish Restoration Program (WSFR) of the U.S. Fish and Wildlife Service is responsible for administering federal trust fund dollars on behalf of 56 states, territories and the District of Columbia to fund projects and activities related to conservation, wildlife restoration, sport fish, recreational boating, and aquatic education. The Division of Administration and Information Management (AIM) through the Program and Accomplishment Reporting Branch (PAR) is responsible to provide the tools WSFR needs for tracking and communicating the performance of those projects, funded through WSFR's 14 grant programs.

Despite our role in implementing thousands of projects every year, you won't find any shovels, backhoes, or fencing at the PAR Branch headquarters. Our tools are technology and TRACS is the newest and best tool we have. TRACS enables us to track project status, understand project goals, measure project results, and communicate program accomplishments. TRACS makes us more efficient, more effective, more collaborative, more transparent, and more accountable.

When all is said and done, TRACS is still just a tool. It has little value without the projects to which it can be applied. To realize the full promise and potential of TRACS, we are dependent on our partners to collect, input, and report on the information that TRACS manages. The PAR Branch, in turn, makes sure that information is accessible, organized, managed, and reported in a manner that supports our programs and projects. That is the purpose of this user manual - a resource, but also a reminder that TRACS depends on the strength of WSFR's partnership with the states and territories to be successful.

So, thank you for your support and assistance in bringing TRACS to reality. And, thank you in advance for the important contribution you will make in the future. Lastly, thank you for being our partner.

- Tom Busiahn, Chief, Division of Policy and Programs, USFWS

- Dan Hogan, Chief, Program and Accomplishment Reporting Branch, USFWS

TRACS Contacts

Headquarters

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Program and Accomplishment Reporting (PAR) Branch

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Division of Wildlife and Sport Fish Restoration Program
Program and Accomplishment Reporting Branch
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TRACS User Support

TRACS Help Desk:

- Email: tracs-helpdesk@fws.gov
- Phone: 1-844-408-7227
  (1-844-40-TRACS)

TRACS Training:

- Email: tracs-training@fws.gov

TRACS System Requirements

Hardware	Minimum Requirements	Recommended
CPU	Single Core, 2.33GHz or faster x86/x64	Dual Core, 2.67Ghz or faster x86/x64 (i5 or i7+ processor)
RAM	4GB	8GB or greater
Screen Resolution	1024x768	1920x1080 or greater
Other hardware	Mouse or track pad	Scroll Mouse (with scroll wheel and left/right click), Graphics Card (512 MB or higher)

Software Type	Required Version
Operating System	Windows 7, 8.1 or Macintosh OS 10.6 or higher. Laptop or desktop only (not currently supported on tablet/iPad or smartphone)
Browser	Internet Explorer 10+ or Google Chrome (current version). Other browsers may work but are not in spec - using another browser is NOT recommended.
Application plug-in	Flash is **required** for TRACS (latest version is best) Click here for latest version
Productivity Tools	Recommended: Microsoft Office 2007/2010/2013 or latest and Adobe Reader (PDF)

Network/Infrastructure Requirements: The TRACS mapper uses your local bandwidth to display images, map projections and project data. To reduce the bandwidth used, limit the use of additional layers and add filters to reduce the number of projects visible (for more information visit the Managing Filters page).

Recommended minimum upload/download speed: 5Mbit/3Mbit (For classroom training, the recommended upload/download speed is 10Mbit/5Mbit for 10 students or 20Mbit/5Mbit for 20 students).

Troubleshooting Tips:

- Ensure that your workstation (computer and internet connection) meets the minimum requirements and contact your local IT staff for assistance.
- ***Note:*** *The TRACS help desk and technical support team cannot address local IT infrastructure issues. Please direct questions about your computer, network, or bandwidth settings to your local IT staff.*
- Give the mapper a few minutes to load and wait until has fully loaded before moving the map or clicking on the menu buttons. If TRACS freezes, try refreshing the browser or try closing and reopening it. Also, try switching browsers (current versions of Internet Explorer and Google Chrome typically work best).
- If the mapper is loading slowly, consider creating a "New Filter" to show fewer results on the mapper (such as a filter to view only your own projects) and make it your default filter (see Lesson 11b: Using Layers and Filters for more information).
- Contact the TRACS help desk if you experience other technical issues or errors in the system.

Lesson 1: Introduction

The purpose of this first chapter (the first lesson in the TRACS Basic Course) is to provide a high level overview of the TRACS system, how it is used and why it is so important to the overall grants process.

Why is TRACS Important?

The **bottom line is the public wants to be able to see how their money is being used**, and the term public means more than just voters. It also includes **legislators** and **key industry stakeholders** that make critical decisions about the funding that supports your work at both state and federal levels.

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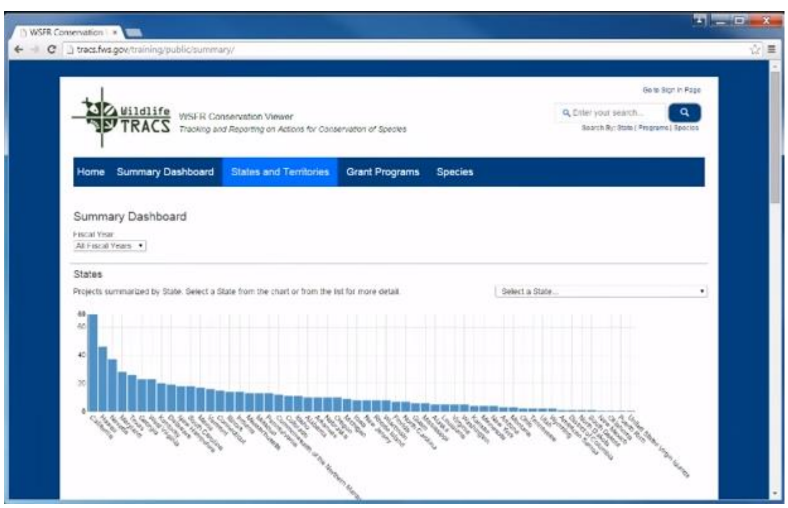
TRACS provides a **standardized tool for creating searchable reports** on a range of grant-funded projects.

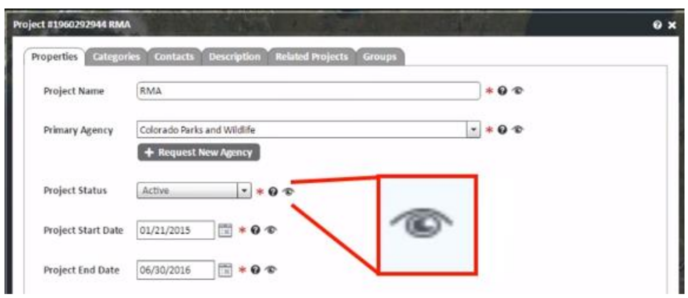


TRACS is designed to be a project reporting tool and <u>not</u> a grant creation tool. The grant application still needs to be submitted to your WSFR regional office and grants.gov and fiscal information is still tracked in the FBMS system. Because of the seemingly parallel nature of the grant application and reporting processes, TRACS can sometimes be seen as being outside of the grant process, but it is important to understand that it is the only way that the public and those key decision makers can verify the hard work and the results that keep your funding alive. It provides reporting tools not available in other systems, reporting tools that **meet or exceed federal regulations.**

How to Use TRACS:

1. Login into TRACS and define the project area in TRACS using the mapping tool.
2. Enter overall project data including name, statement and objectives.
3. Submit the project proposal for approval. Note that is about the project being approved in TRACs (not the grant being awarded).
4. Enter the individual actions that accomplished the project objectives and the estimated costs for those actions.
5. Submit your Performance Report for approval.

Once the data has been entered and approved, it will be visible on the TRACS Public Viewer. Please note that not all information will be visible on the public site; only fields marked with the “eye” icon will be.



On the TRACS Public Viewer (www.tracs.fws.gov/public) anyone can view general grant statistics and individual project information by state or territory, grant program and species.

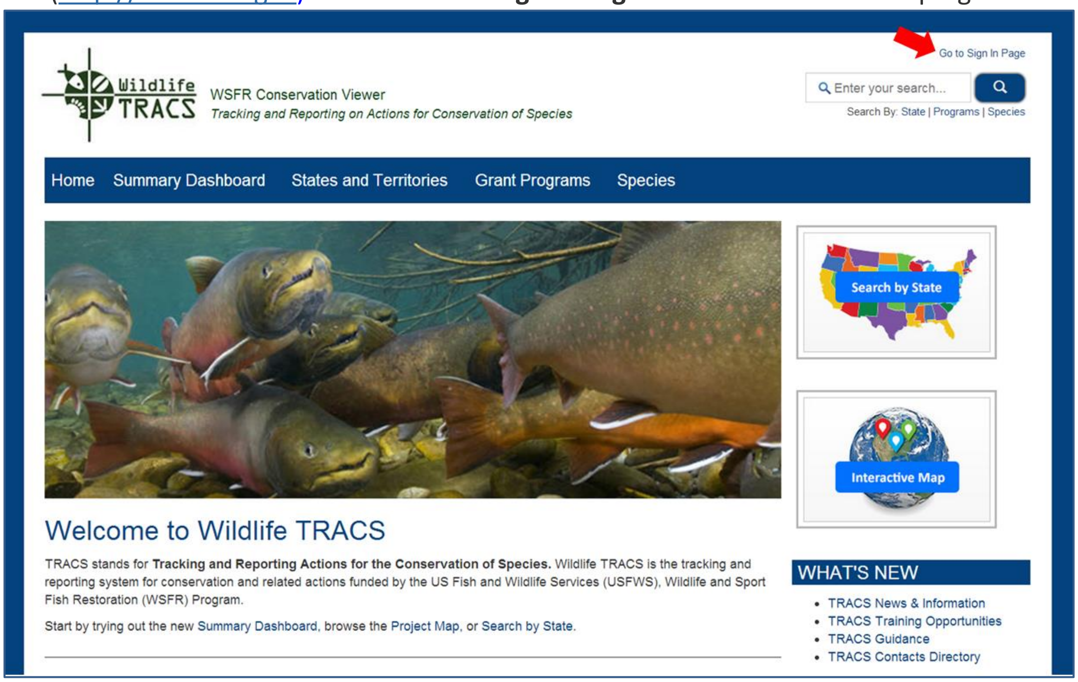
As you can see, **the data that you enter into TRACS really does matter**, so keep that it mind when you enter your project information!

Access and Registration

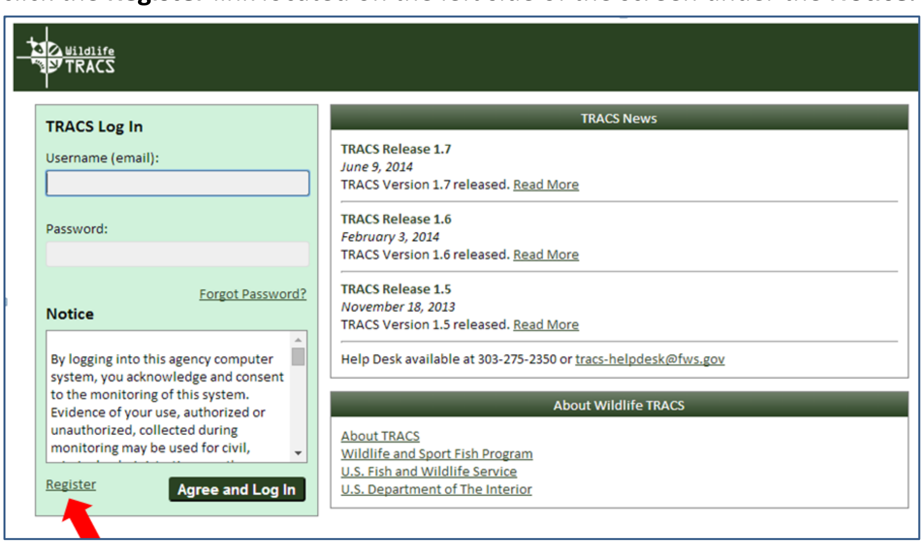
TRACS has both a live (production) site and a training site, which is a copy of the live site used for training purposes only. Users must register separately for the training site.

1. **To access the live TRACS production site directly, go to to: https://tracs.fws.gov/data_tracs/dt/dashboard.** To access the training site instead, go to: https://tracs.fws.gov/training/data_tracs/dt/dashboard. To access the training site instead, go to: **https://tracs.fws.gov/training/data_tracs/dt/dashboard**.

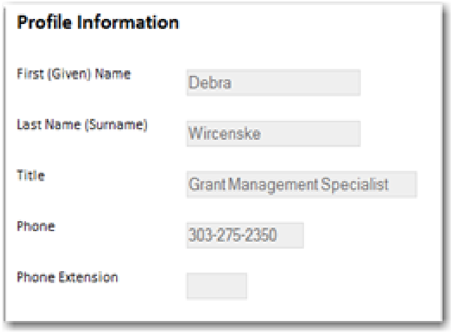
Alternate method: To access the TRACS production site from the Public Viewer (http://tracs.fws.gov) click the **Go To Sign In Page** link in the middle or top right of the screen.



1. Login with your username (email) and password. If you do not have an account, click the **Register** link located on the left side of the screen under the **Notice.**



2. Complete the **Profile Information** using only your official contact information.



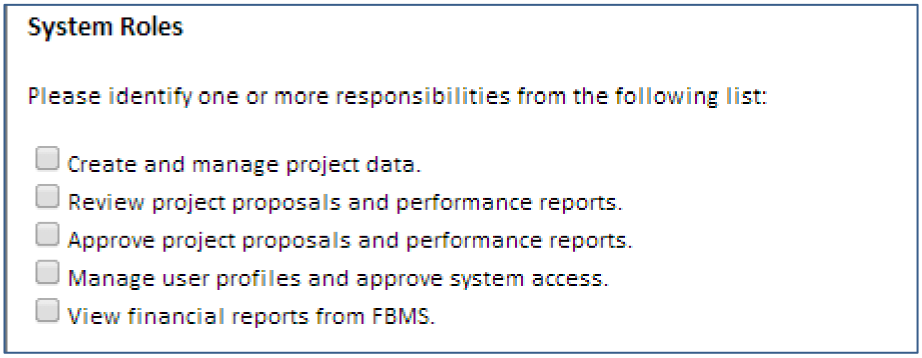
3. Select the appropriate **Agency Type** from the drop down list. (e.g. Federal, Tribal, State). If your agency is not available, email the tracs-helpdesk@fws.gov with a request to add the agency to the system.

4. TRACS uses your e-mail address as your unique username; therefore, if your e-mail address changes you will need to register for a new access account and your old account will be disabled by an agency **User Administrator**.

- Type in your full official e-mail address and confirm
- Create and enter password and confirm

Your password should be a minimum of 12 characters with a combination of lower, upper case and contain one non alphanumeric character, such as: #@. Numeric characters are optional. Passwords should change by at least two characters, and cannot be re-used within 365 calendar days. If you believe your password has been compromised, change your password immediately and report the incident to the TRACS Help Desk at tracs-helpdesk@fws.gov. If a user account name and password are keyed in five (5) consecutive times without correctly accessing the system, the account is automatically locked for 15 minutes as a security precaution.

5. Identify one or more responsibilities from the System Roles list:



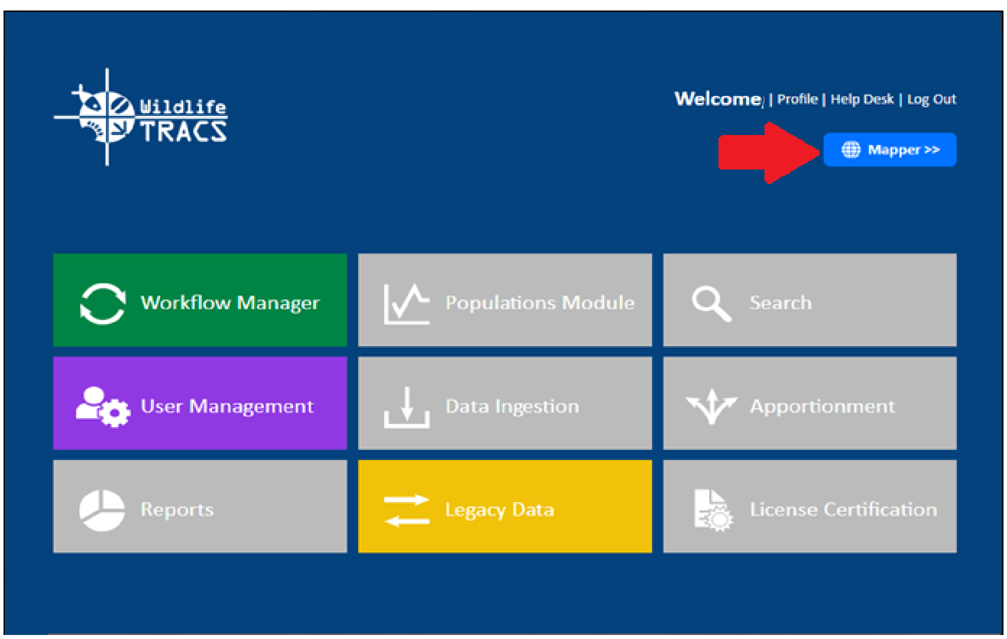
6. Click on the **Rules of Behavior for Users of the Wildlife TRACS System** link. Check the **Rules of Behavior** box indicating that you have read and will comply with them.
7. Type the **Verification Code** as shown on your screen. (If you unable to read the verification code select the refresh button located on the right side of the Verification Code to generate a new code.)
8. Click the **Register** button.

- **User Administrators** receive a system generated e-mail with the subject **New TRACS Registration Request Waiting for Your Approval** when the requesting user has successfully completed the registration process.
- Users receive a system generated e-mail with the subject **TRACS Registration Request Approved** when the **User Administrator** successfully approves the TRACS registration. **Keep in mind that this may take 1-2 weeks, so plan ahead!**

9. Once a registration request is approved, TRACS users can log into **Wildlife TRACS**.

10. Type in your username which is your official e-mail address and the password that you created. Select the **Agree and Log In** button.

Congratulations you have successfully logged into Wildlife TRACS once the blue Dashboard screen opens! This screen gives you access to a range of specialized modules (such as Workflow Manager), but for basic project entry you will start by clicking on the blue **Mapper** button in the upper right.



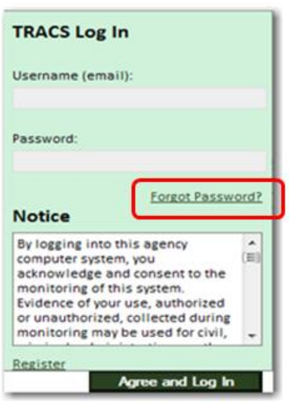
The rest of the chapters and lessons will help you to complete a generic data entry process in TRACS. Policies and procedures vary by department, region and grant type so check with your supervisor or WSFR grant coordinator if you have any questions.

Forgot Password

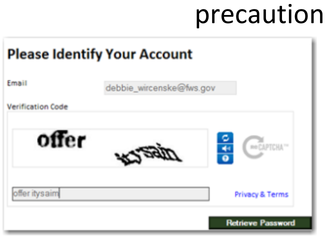
The requirement for passwords is set by DOI policy:

- Policy requires a 15 minute lockout after 5 failed attempts to enter a password. We recommend waiting 20 minutes because the 15 minute lockout period resets if another failed attempt occurs during the lockout period.
- Passwords can only be reset once within a 24 hour period. This requirement can be overridden by modifying the password directly in the database; however, this requires assistance from the Help Desk.
- Passwords must be changed every 60 days and must be unique compared to the previous 24 passwords used. Any change to a password constitutes a unique password (i.e. changing a single character or digit constitutes a new unique password).
- Contact the Help Desk if you are unable to reset your password (such as when the password has already been reset in the last 24 hours).
- If your account has been deactivated by the user administrator, you will need to complete the registration process again.

1. Click the **Forgot Password?** link located on the left side of the **TRACS Log in** page under the **Password** field.



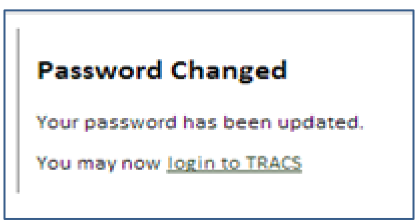
2. Fill out the form.
   - Enter your official e-mail address (e.g. **user@stateagency.gov**).
   - Enter the Verification Code.
   - Click the **Retrieve Password** button.
   - TIP: Passwords can only be changed <u>**once**</u> during a 24 hour period as a security precaution.



3. You will receive a system generated e-mail via tracs-helpdesk@fws.gov with a link to reset your password. Click the link contained within the system generated e-mail.

4. The link in the e-mail will re-direct you to the **Reset TRACS Password** screen. You will never receive an email to reset your password unless initiated in TRACS. If you receive a password reset email and you did not initiate the reset procedure, contact the **TRACS Help Desk** immediately at tracs-helpdesk@fws.gov.
   - Enter your official e-mail address and confirm.
   - Create and enter your password and confirm.
   - Type the Verification Code.
   - Click the **Change Password** button.

5. A system generated notification that your password has been successfully changed will be sent to the user email address.
6. Click the **Login to TRACS** link



7. You will be re-directed to the **TRACS Log In** screen. Type in your username which is your e-mail address and your new password. Click the **Agree and Log In** button.

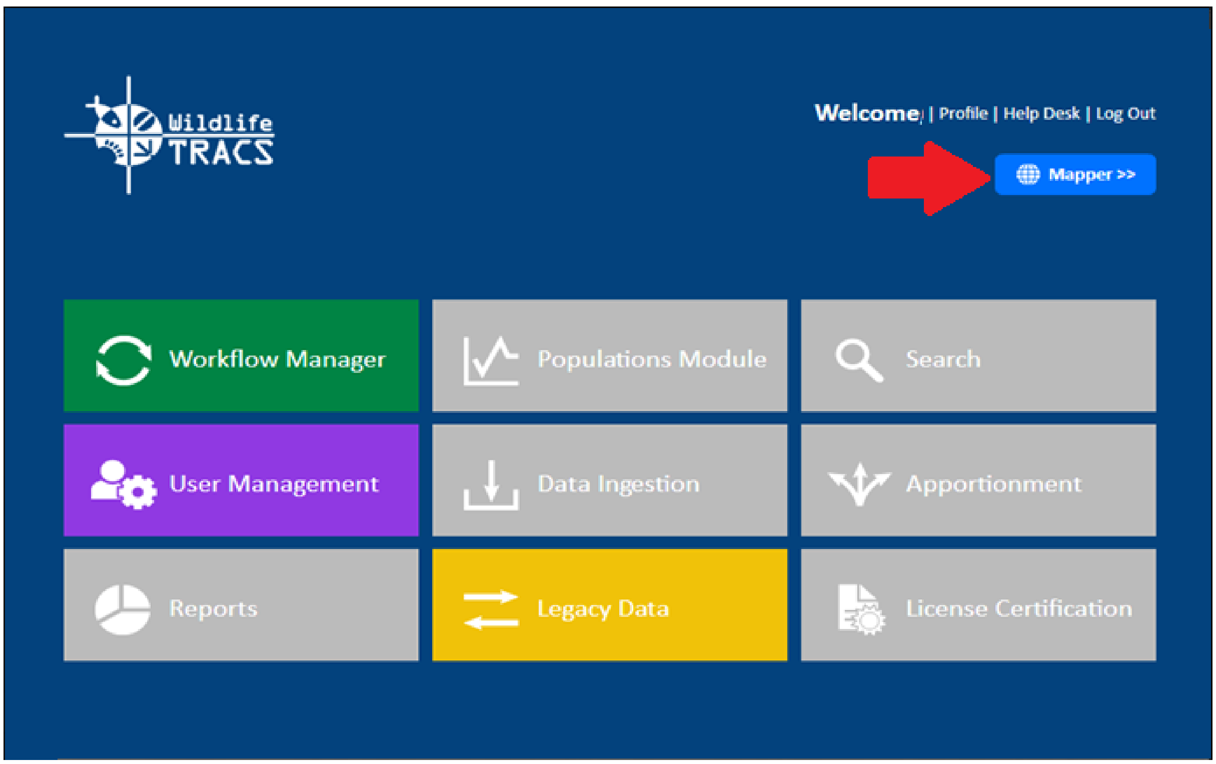
Lesson 2: Mapping your Project

This chapter will demonstrate how to create a map your project using TRACS.

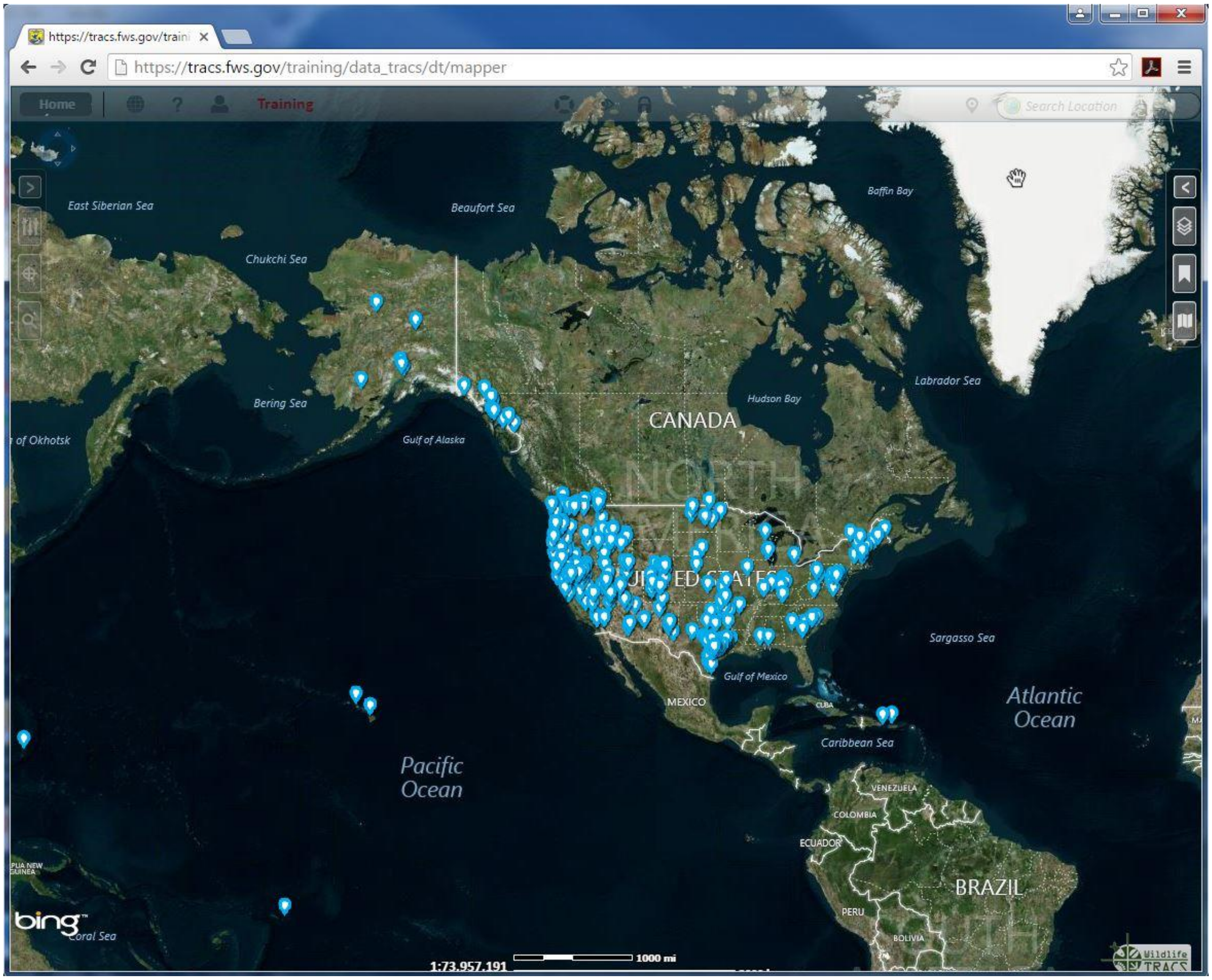
What is a mapper and why is it required?

The mapper was designed to give a graphic representation of the project location. It is important to know that it is tied to detailed geo-spatial data that is essential to the overall reporting process as well as being a requirement for the grant application (FWS GIS policy 270 FW 8). It also allows you to define a project by its location, region or state with then may be associated with a specific agency or used for cross-agency coordination.

1. Select the blue **Mapper** button on the **TRACS Dashboard**.



Be aware that it may up to several minutes for the mapper to load all of the projects in your group (agency, department or region).



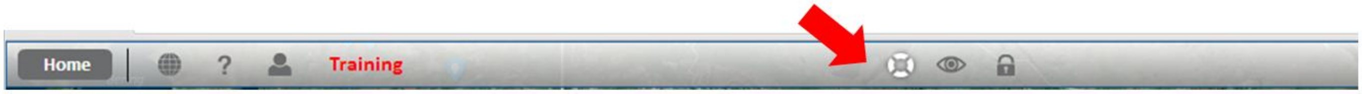
2. Navigate the map to a desired geographical location using your mouse or the navigation toolbar.

Navigation Tips:

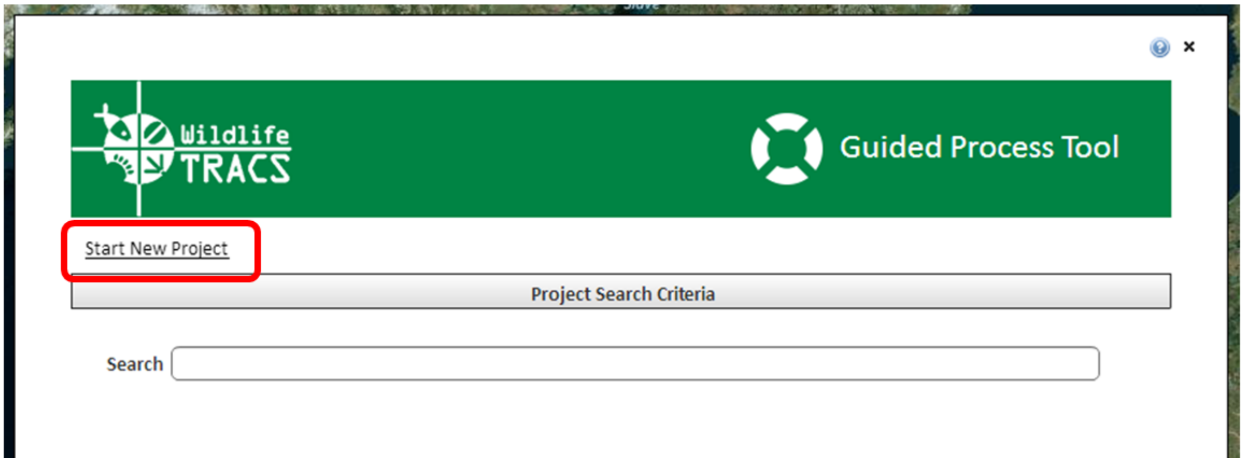
- Drag and drop the map to move it
- Use the scroll wheel on your mouse to zoom in (scroll up) or zoom out (scroll down)
- Use the Navigation Toolbar (translucent blue icon located in the upper left of the mapper)
- Additional navigation tips can be found in [Mapper Navigation Tips] section of chapter 11a.

Be sure the mapper is zoomed in or zoomed out enough to enable an accurate representation of the entire project area.

3. When you have the location positioned so that the entire project location is visible, click on the small "life preserver icon" known as the **Guided Process Tool** from the **Mapper Toolbar** (top of screen).



4. This opens the Guided Process Tool search window where you can create a new project or search for an existing project. Click **Start New Project** link.



5. The Feature Editor window will open. This area allows you outline the area of your plan, project or action.

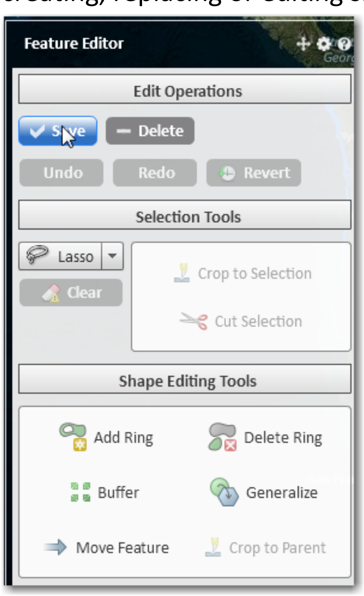
- **Plan:** defines the geographic area for a larger effort (such as a strategic plan) with a red boundary. Note: A plan is optional and is not required to enter a project.
- **Project:** defines the geographical area where the project occurs with a blue boundary. The project boundary is required.
- **Action:** used for reporting where the project-specific actions have taken place with a green boundary. Actions are required, however they are not created until after the project has been created.

Note: The basic tools for creating a plan, project or action all function the same way. In order to use all of the drawing tools, the mapper needs to be zoomed in to 1:288,000 scale or greater (in other words, zoom in until all four drawing tools are active).

Select the appropriate drawing tool and create the project boundary. These options are:

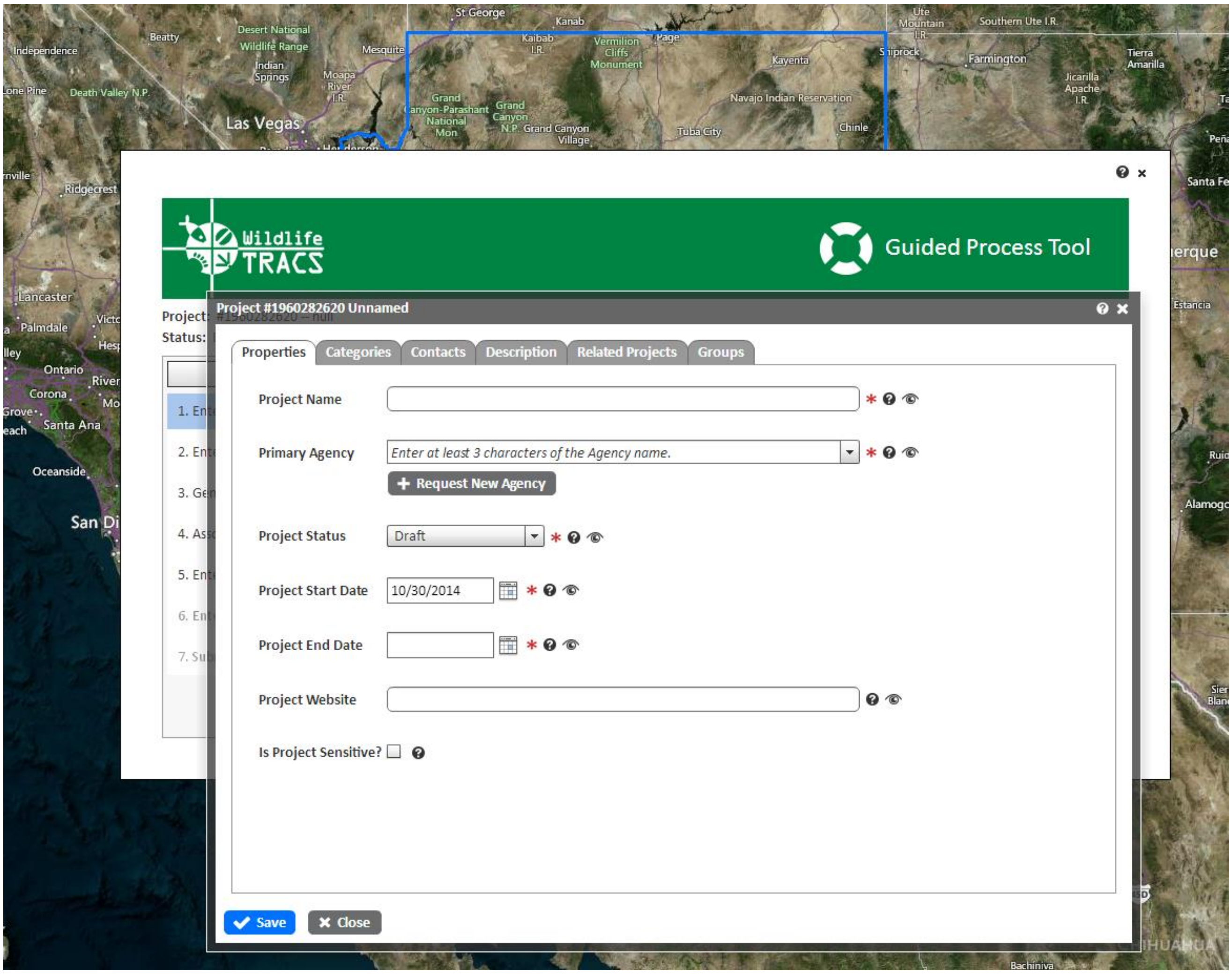
- The **Freehand Polygon** allows end-users to capture specific location areas which are contoured, e.g., habitat area, forested area. Freehand Polygon is created by holding down the left mouse button and moving the cursor until the desired polygon is visible and then releasing the left mouse button.
- The **Geometric Polygon** allows end-users to capture specific location areas which are linear (point-to-point). Geometric Polygon areas are created by left clicking the mouse of the map to a single vertex. Continue clicking the left mouse button at each vertex of change in direction until the desired polygon is visible. Double click the left mouse button to complete the feature.
- The **Select an Existing Boundary (also known as the Geopicker) tool** is used to select a shared shape from a reference layer. The tool allows end-users to capture specific location areas which have pre-determined boundary types (Political, Hydrological, Coastal or Alaska). Use this tool if a plan and project is Statewide or for a specific County.
- The **Import Shapefile tool** is used to import a shapefile from a local source. A shape file contains spatial features which represent a specific type of location. e.g., rivers and lakes. The shapefile import tool accepts all local coordinate systems (NAD27, NAD83, WGS84) and translates the shape into the flat webmercator display. The import tool requires a zip file that contains standard shape file extensions.

6. Once you have defined the outline, click **Select** or **Save** in the feature editor window. For more tips on creating, replacing or editing shapes, visit the Shape Creation and Editing page.



7. Now that you have created and saved the shape, the **Project Properties** window will appear. This is where you begin entering data for the project itself.

Note: The Project is automatically assigned a system generated ID number and will start out as "unnamed". It is important to enter a project name right away and save the project so you can locate in the future (see the next chapter for more details).



Lesson 3: Defining your Project Properties

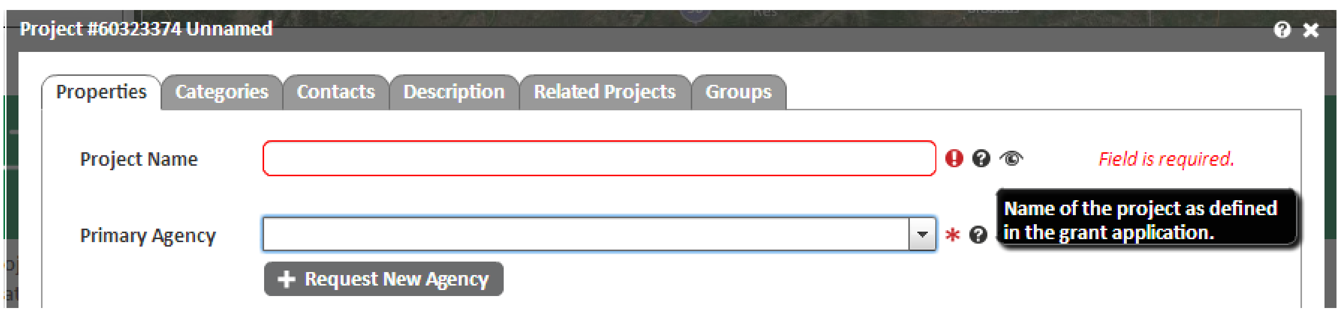
This chapter will demonstrate how to define Project Properties in TRACS, which are the core details upon which all of the other project data are based.

Important Icons:

Red asterix or red exclamation point display by required fields (box around field will also appear in red if status is Active)

Hover over the question mark icon to view information about that field

The eye icon indicates field will be displayed on the Public Viewer and on public reports



Properties tab

1. Enter the **Project Name** (e.g. NV - Hunter Education Project)
   - For consistency in style, particularly on the Public Viewer, there is a recommended Project naming convention. At a minimum, a two letter State abbreviation followed by a hyphen and a short, descriptive title is required. Other optional identifiers that can follow in parentheses include FBMS number, FAIMS grant number and year. It is understood that not all Projects are in a single State (e.g., competitive State Wildlife Grants, multistate projects), so substitutions for the State abbreviation can be used for these use cases.
   - **State Abbreviation - Descriptive Title (optional FBMS/FAIMS/Year identifiers) valid examples:**
     - **CA - Upper Butte Basin Wildlife Area (F13AF00345/W-54-D/2013)**
     - **CA - Grizzly Island Wildlife Area (F13AF01314)**
     - **NV - Sage Grouse Research 2014**

2. Select the **Primary Agency** from the drop down list by typing at least three letters of the state or agency name into the search box.

   Note: Do not search by the state or agency abbreviation. Make sure to enter the full name or part of the full name of the state or agency (ex. To search for Alaska Department of Natural Resources, type “Alaska” instead of AK or DNR).

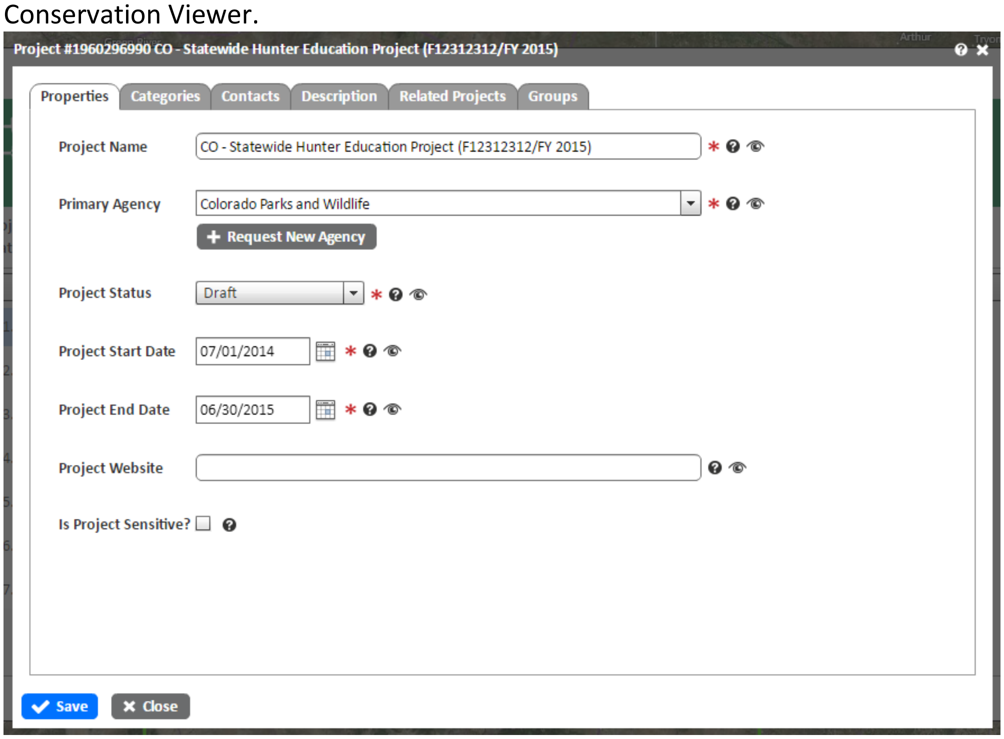
   If you do not find the correct agency, try alternate spellings. If you still cannot find the agency, click on the “Request New Agency” button. Complete the form that appears and click Submit. If you need to request a new agency, you may save your information as a Draft and wait until the agency has been added to the list (this may take up to a week).

3. Select the **Project Status** (e.g. Draft, Active, Completed). The Draft status is used initially and allows you to save the form at any time. All field validation requirements must be satisfied for Projects with an "Active" or "Completed" Project Status before the Save button activates. Projects with a "Draft" status can be saved at any time; however, workflow operations are not available for Projects in "Draft" status.

4. Select the **Project Start Date** and **Project End Date**.

5. Enter the address of an external **Project Website**, if applicable.

6. If the project is considered **sensitive** (i.e. related to a listed species, private landowner, or land acquisition), check the **Is Project Sensitive?** checkbox. By checking this box, the spatial boundary of a sensitive project is generalized so the exact location of the project is hidden and the polygon is buffered to show the next largest political boundary (e.g. county, state or country). Keep in mind that projects marked as sensitive will not display in the Public Conservation Viewer.

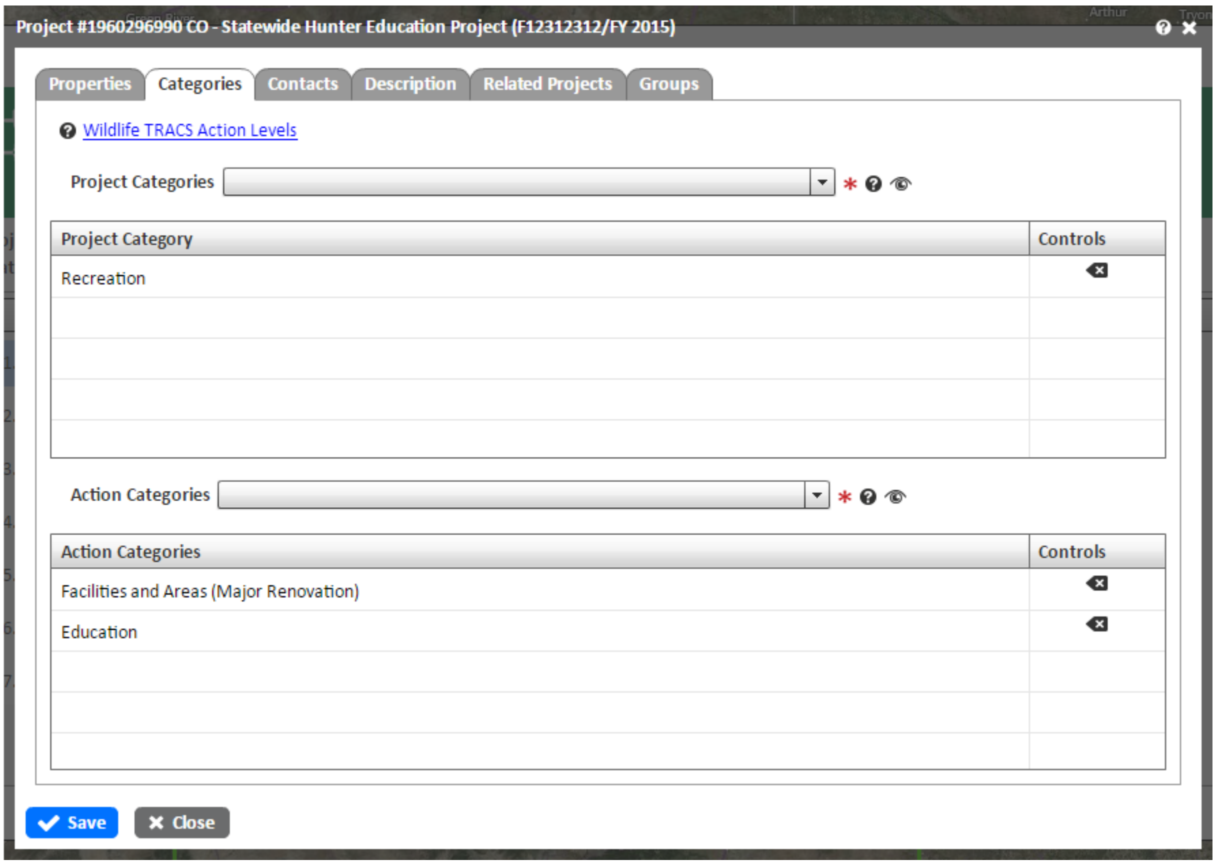


Categories tab

The categories tab is where you define the intent of the project in broad categories (in short, general descriptions of what the project will do).

1. Select one or more **Project Categories** from the drop down list (e.g. Conservation/Management).
2. Select one or more **Action Categories** from the drop down list (e.g. Data Collection and Analysis). The **Action Categories** you select determine the objective and action types available later.

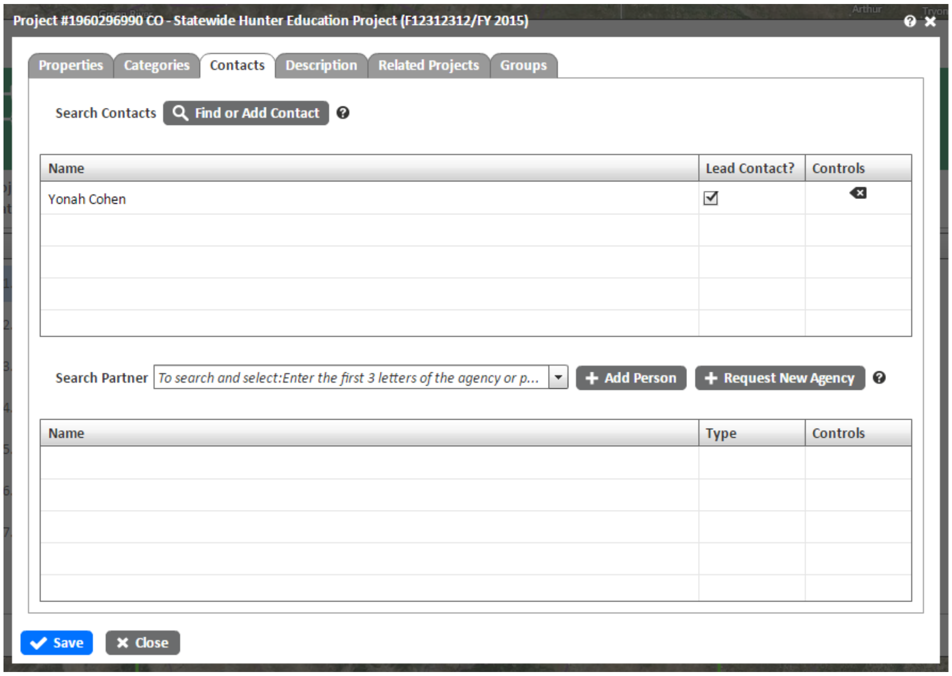
Use the x in the Controls column to remove an item.



Contacts tab

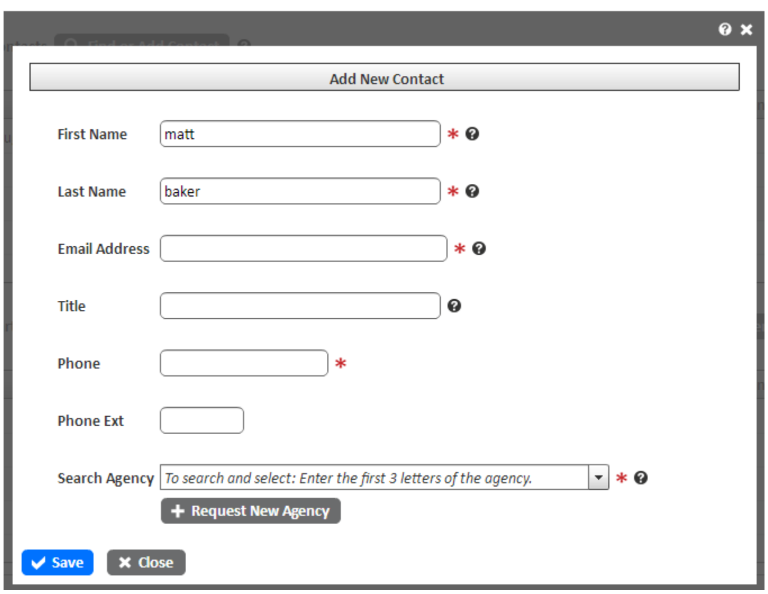
1. Select the **Find or Add Contact** button to add the grant contact(s) such as the federal aid coordinator for your agency (later on there is a field to enter the principal investigator for the project).
2. Enter the search parameters, **First and Last Name** or **Email Address**
3. Click the **Search** button. If no matches are found select the **Add New Contact** button. Refer to Adding New Contact section below.
4. Mark the check box for the **Lead Contact** (even if there is only one contact)
5. Select the **Search Partner** drop down list if applicable (i.e. Department of Marine and Wildlife Resources).

6. If no matches are found click the **Add Person** button or **Request New Agency** button.



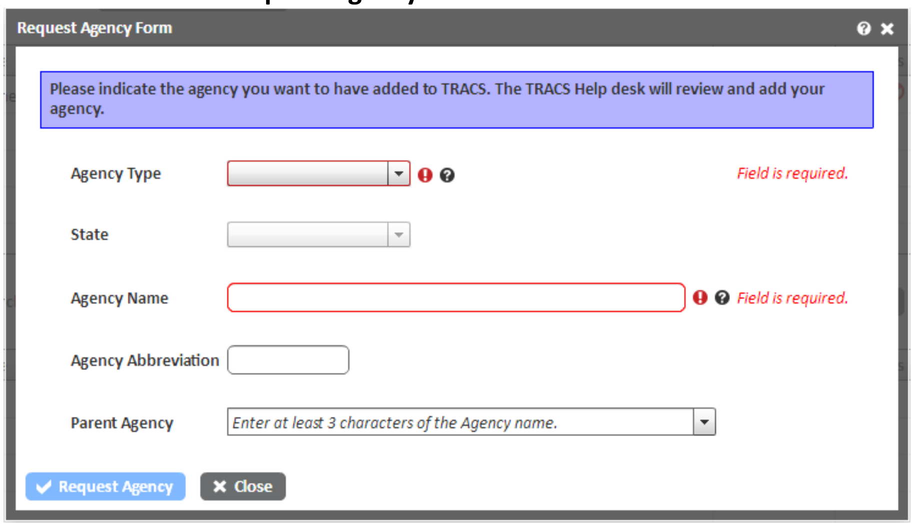
Adding New Contact

- Enter **First and Last Name**, **Title, Phone and Email Address**. (Required fields)
- Enter the first three letters of the agency name into the **Search Agency** predictive search box.
- Select the contact **Agency** from the drop down list.
- Select the **Save** button.



Adding a new Agency

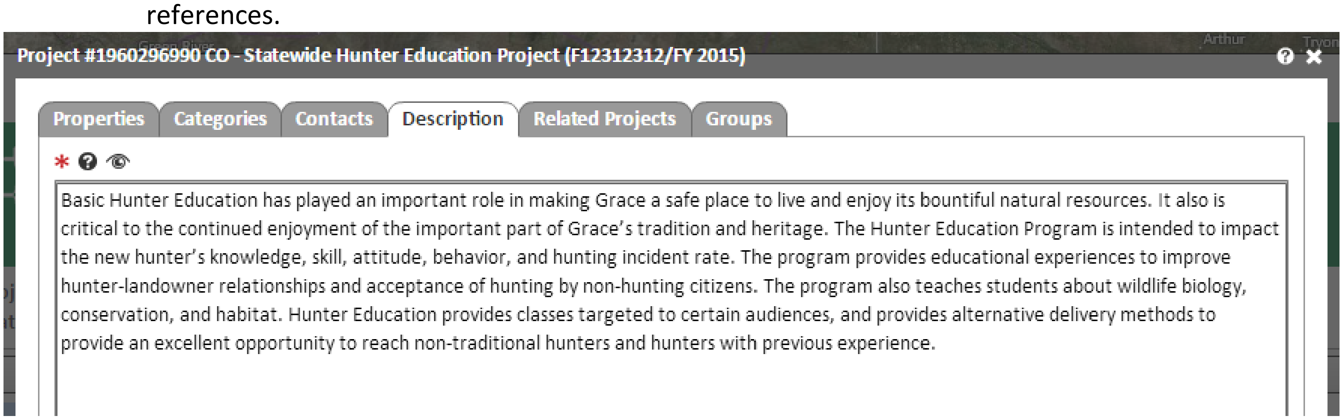
- Select the **Agency Type** from the drop down list (e.g. Federal, State, Tribal, Local, or NGO).
- Select the **State** from the drop down list (if applicable).
- Enter the **Agency Name** (e.g. Arizona Mollusk Natural Resources).
- Enter **Agency Abbreviation and Description** (optional).
- Enter the first three letters of the agency name into the **Parent Agency** predictive search box.
- Select the **Parent Agency** from the drop down list.
- Select the **Request Agency** button.



Description Tab

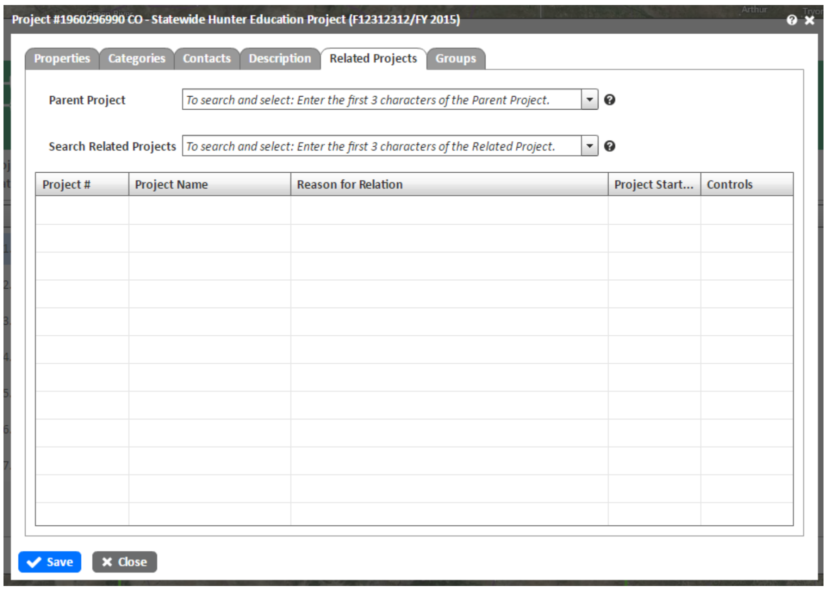
1. Enter or perform a copy and paste into the **Public Description** text box.

   - Use the **Ctrl+C** and **Ctrl+V** commands or the mouse right-click menu to perform a copy and paste from another document source. Fix formatting if needed.
   - The information entered under the **Public Description** will be visible to the public and should be written as an abstract using common terms and language that is free of acronyms or jargon. Components from the Need section and Expected Results section make good references.



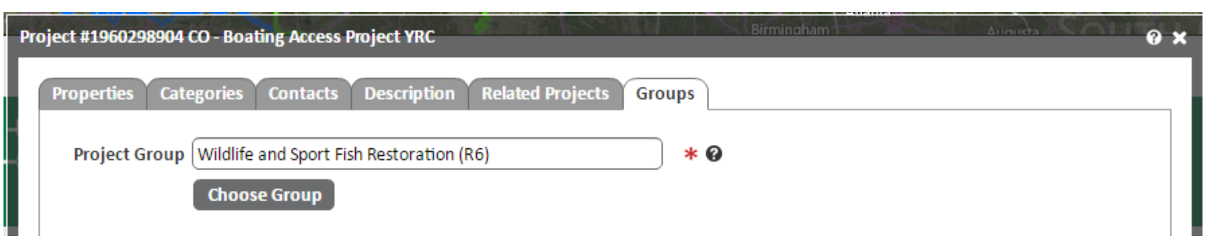
Related Projects Tab (optional)

1. Enter the first three letters of the project name into the **Parent Project** or **Related Project** predictive search box.
2. Select a **Parent Project** or **Search Related Projects** from the drop down lists.
3. The **Reason for Relation** and **Project Start** fields should describe the reason for creating a relationship between projects.
4. Click the **Save** and **Close** buttons.



Groups Tab

1. The Groups Tab displays the group associated with the project.

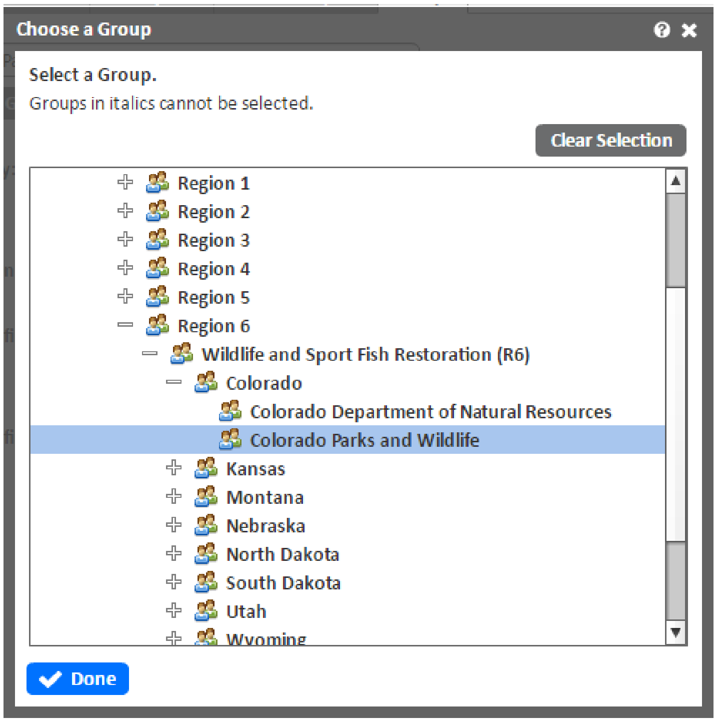


Important Tip: The project group will default to the primary group of the user who enters the project. Therefore, if you have permissions to enter projects for another group, then **it is critical that you choose the correct group for that project! The correct group is the agency responsible for the project (usually at the lowest level, such as the state agency or division).**

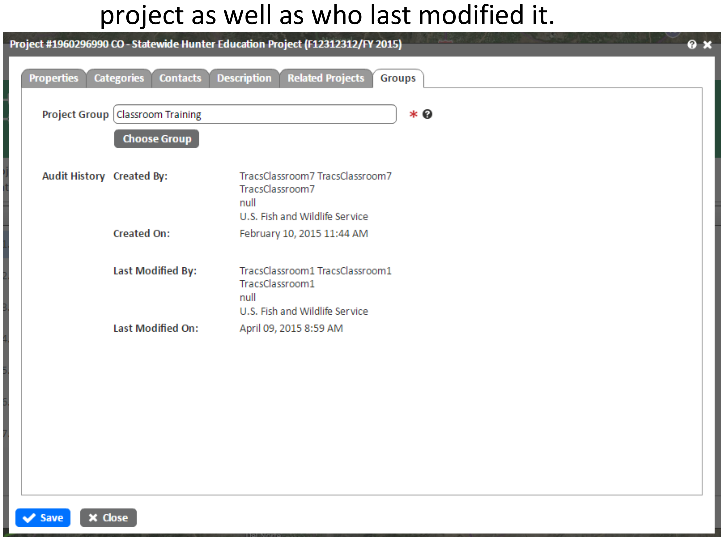
For example, a WSFR regional coordinator who enters a project for a state needs to change the default group from the region to the state agency so that state users in that agency have permissions to edit the project. If the project is not assigned to the correct group, the staff at the state agency will not be able to edit, modify or report on their project.

2. If the default group is not correctly listed as the responsible agency, click on the **Choose Group** button.

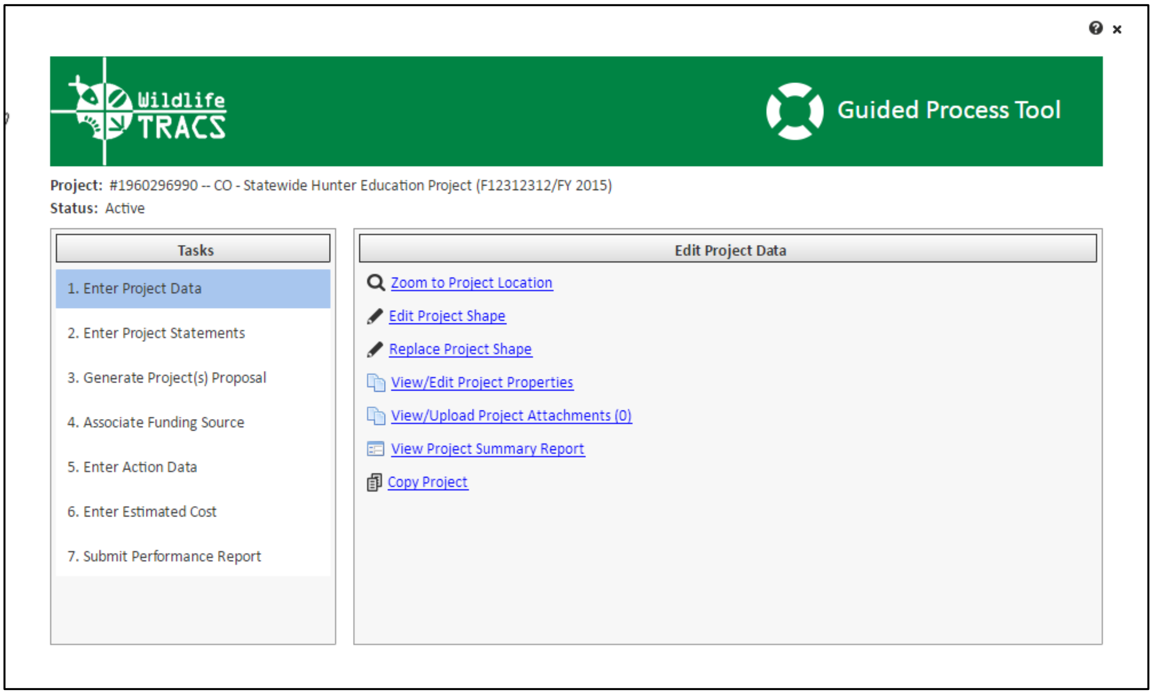
   Note: Groups are hierarchical with a parent-child relationship and are displayed in a tree structure within each parent group. Users from a parent group will have “inherited permissions” to all child groups. Click on the plus sign to expand each sub-menu. Then select the lowest group responsible for the project (such as the state agency or specific division), then click Done.



3. The Groups tab also contains an audit history that displays the date and user who created the project as well as who last modified it.



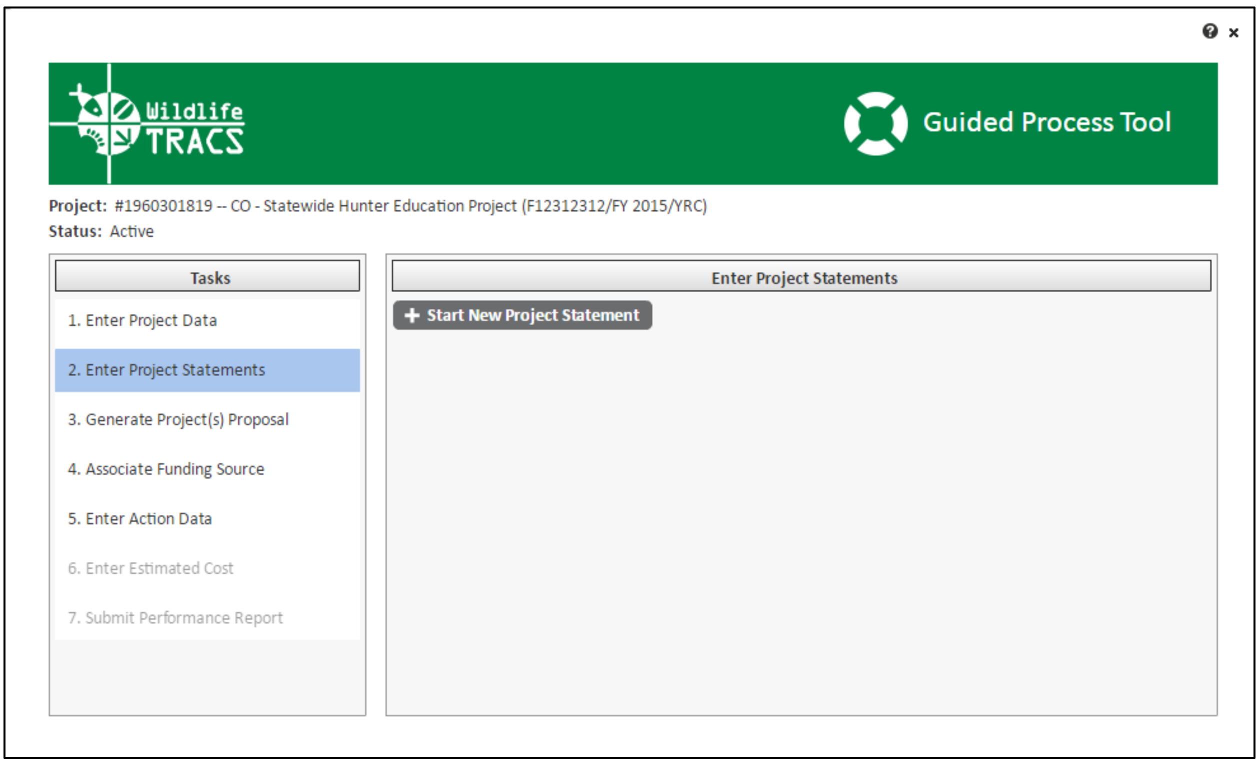
4. Select the **Save** button.
5. The "Project Successfully Saved" window opens. Select the **OK** button.
6. Select the **Close** button to close the project form.
7. You will be directed back to the **Guided Process Tool**. Use the links on the right side to view or edit the project information.



Lesson 4: Entering Project Statements

This chapter will demonstrate how to enter your Project Statement into TRACS. The Project Statement is a mandatory component of the grant process and in most cases can be copied and pasted from your grant application directly into TRACS. The importance of the project statement lies in the fact that it summarizes all of the subsequent data entry and reporting for the project.

1. From the Guided Process Tool, select **2. Enter Project Statements** from the Tasks panel and click **Start New Project Statement** in the right side panel.

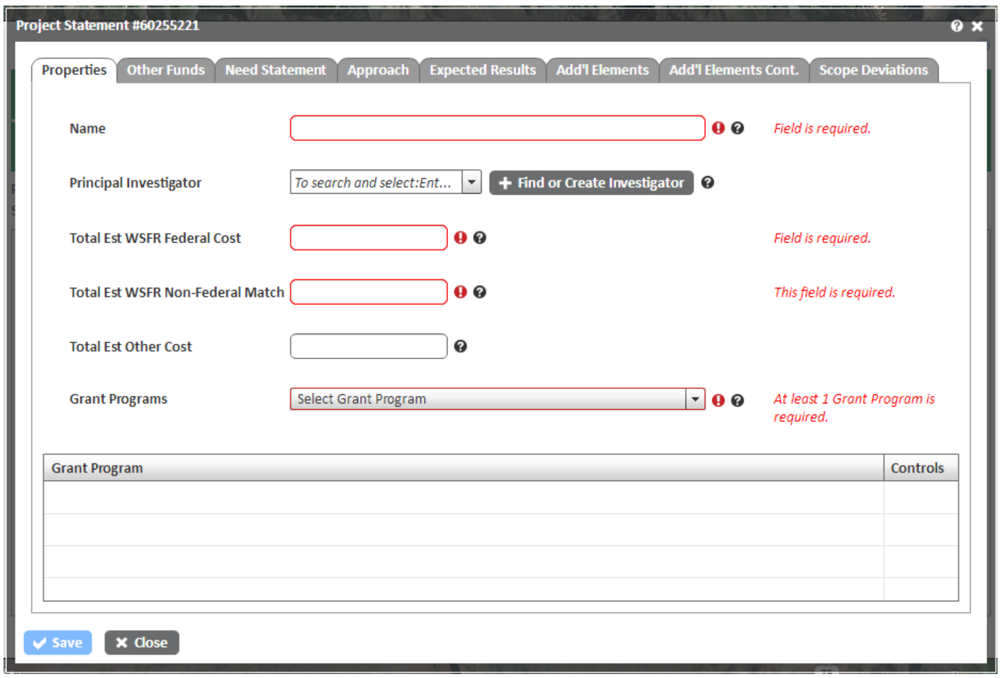


Project Statement Properties Tab

2. When the Project Statement window opens, notice that the **Save** button is greyed out.
   - **Important:** Do not click close without saving first! The Save button is not active until required data is entered under the Properties, Need Statement, Approach, and Expected Results tabs.

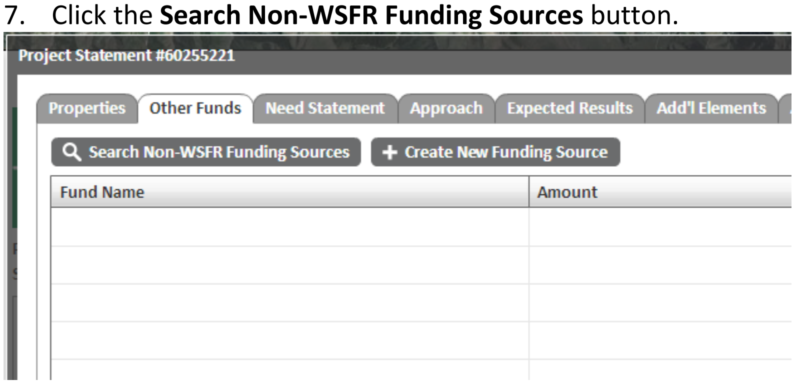
3. Enter the Name of the Project Statement. Use the standard naming convention:
   - State Abbreviation - Descriptive Title (optional FBMS/FAIMS/Year identifiers) Example: CO - Butte Basin Wildlife Area Operations and Maintenance Project (FY 2014)

4. Enter the Principal Investigator (e.g. project or research leader) by typing the first few letters of the investigator's name. If no matches are found select the Create New Contact button. Refer to Create New Contact.
5. Enter the **Total Est WSFR Federal Cost** (federal grant amount) and **Total Non-WSFR Cost** (state match). If applicable, use the **Other Costs** field to document funds received from outside partners (such as other agencies or NGOs).
6. Select the **Grant Program(s)** funding the project from the drop down menu.
   All relevant grant programs must be entered. State users will not be able to update this information once an award is associated with the Project Statement.



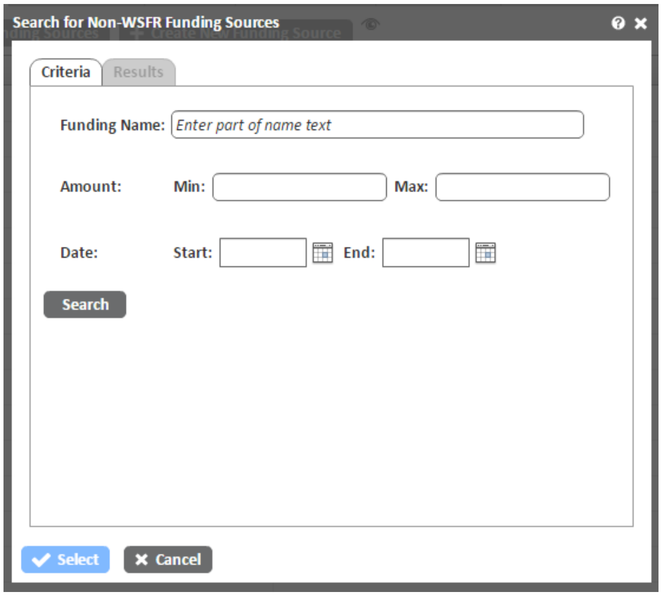
Project Statement Other Funds Tab (fill out if Other Costs entered on previous tab)

7. Click the **Search Non-WSFR Funding Sources** button.

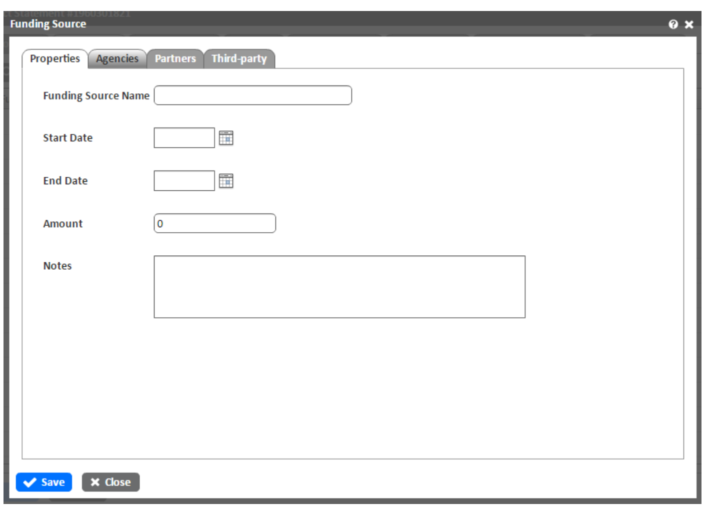


8. The Search for Non-WSFR Funding Sources form displays.
   - Enter the Funding Name.
   - Enter the Amount.

- Enter a Start Date and End Date.
- Click the Search button to search for the funding source. If not match is found, click Cancel.

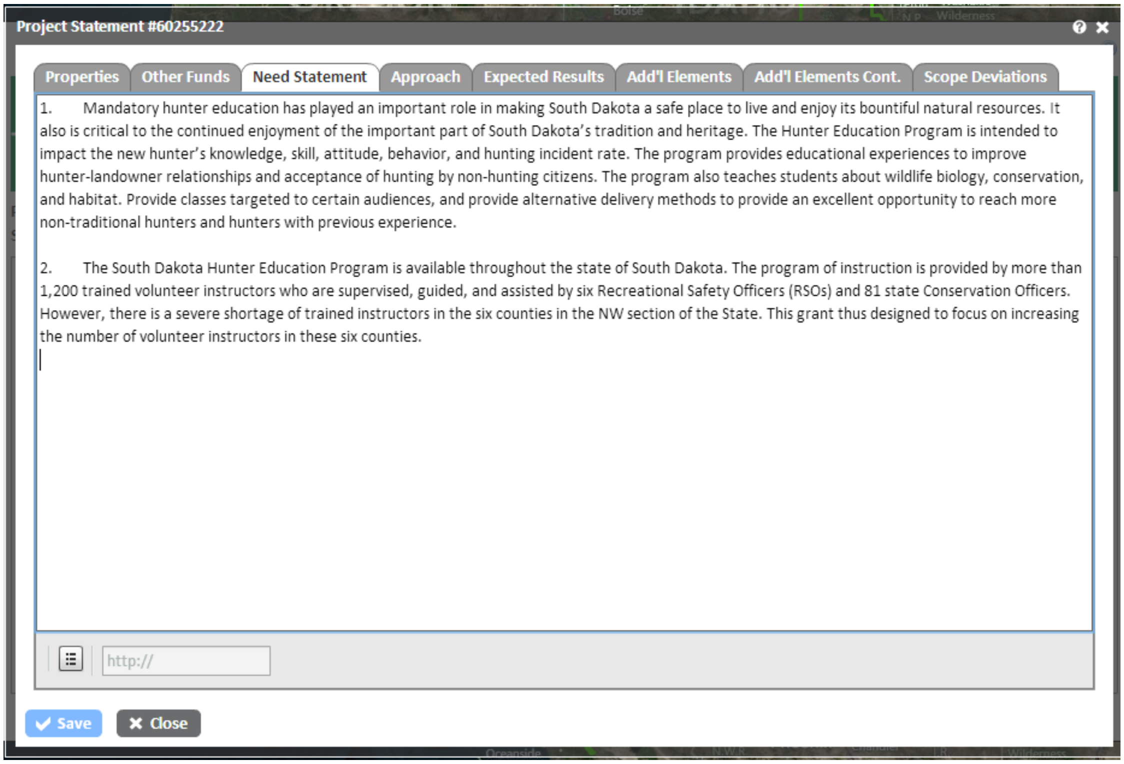


9. If no match was found, click the **Create New Funding Source** button.
   - Enter the Funding Source Name (e.g. Trout Unlimited).
   - Enter the Start Date and End Date.
   - Enter the Amount and applicable Notes.
   - Click the Save button to save the funding source.
   - Enter Agencies, Partners, or Third-parties associated with the funding source if applicable; otherwise, click the Close button to close the New Funding Source form.



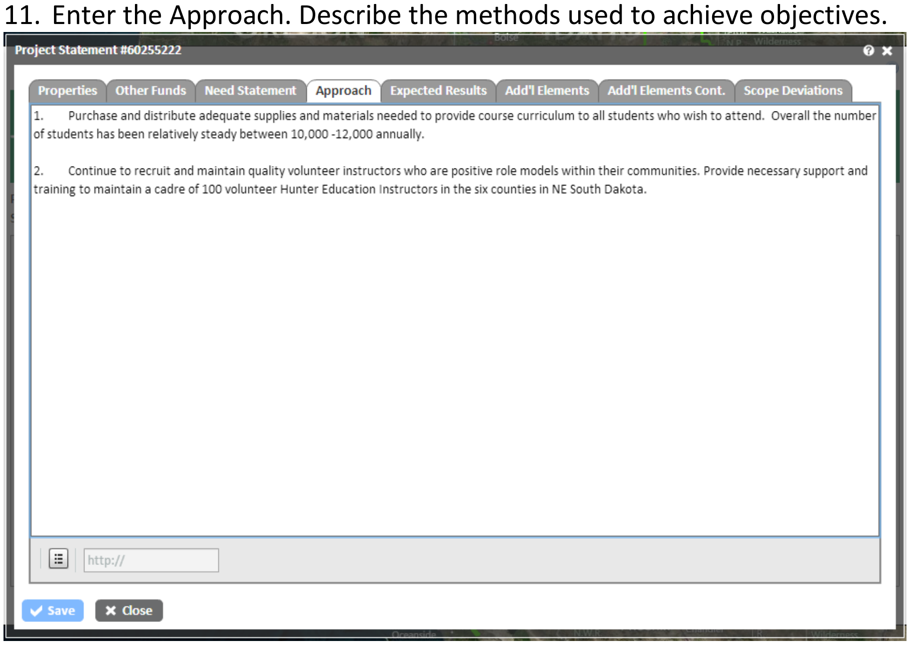
Project Statement Need Statement Tab

10. Enter the Need Statement (or copy/paste). The need statement should explain why the project is necessary by identifying the issue/problem/opportunity and provide supporting evidence.



Project Statement Approach Tab

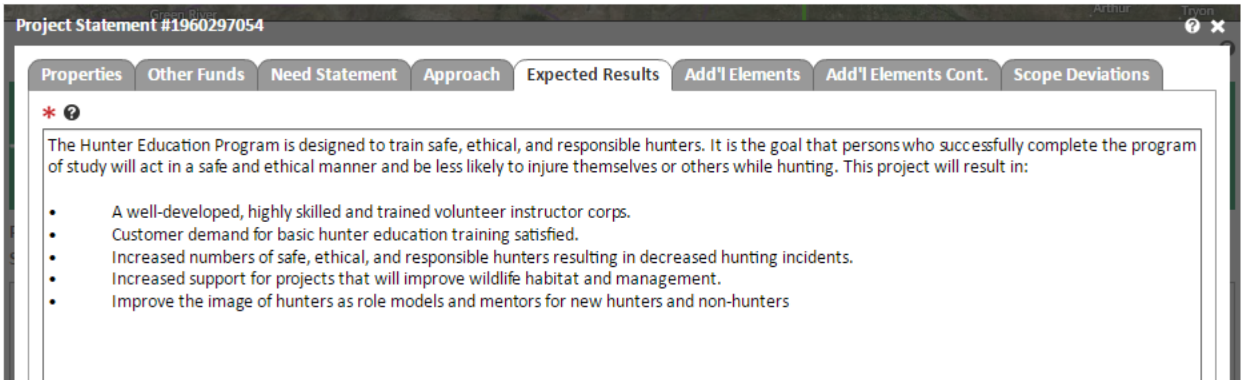
11. Enter the Approach. Describe the methods used to achieve objectives.



Project Statement Expected Results Tab

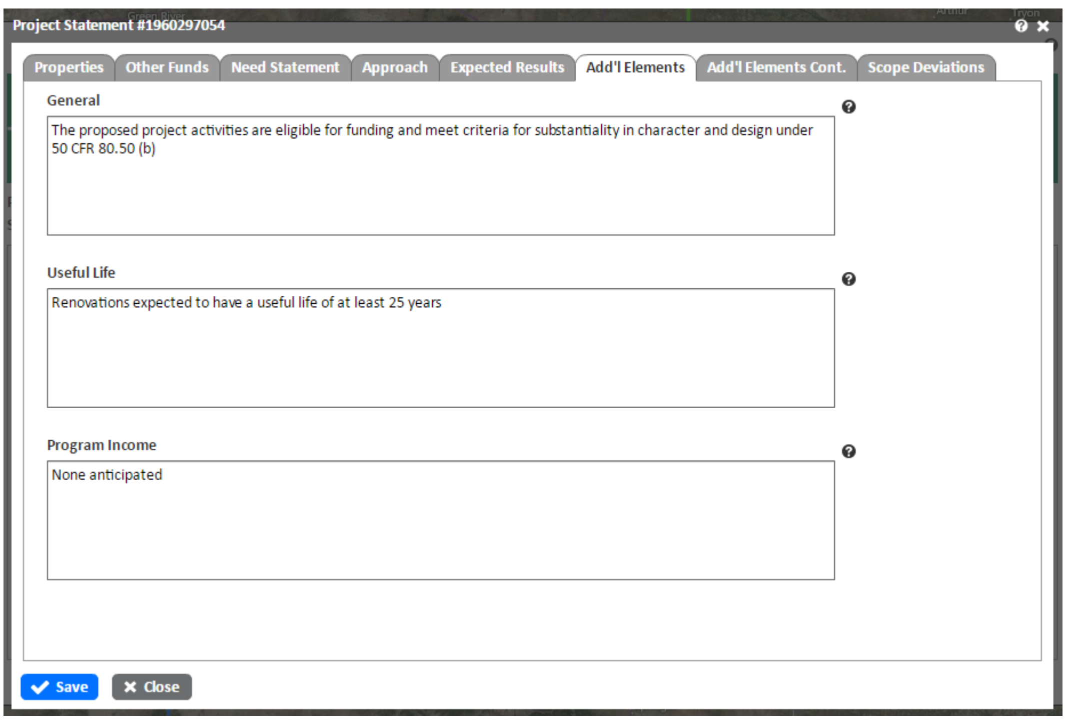
12. Enter the Expected Results. The expected results describe benefits of the project to users and/or species.

13. Click **Save**. The Save button is activated once all of the required fields have been filled in. If the Additional Elements and Scope Deviation tabs are not applicable, click the **Close** button.



Project Statement Additional Elements Tab

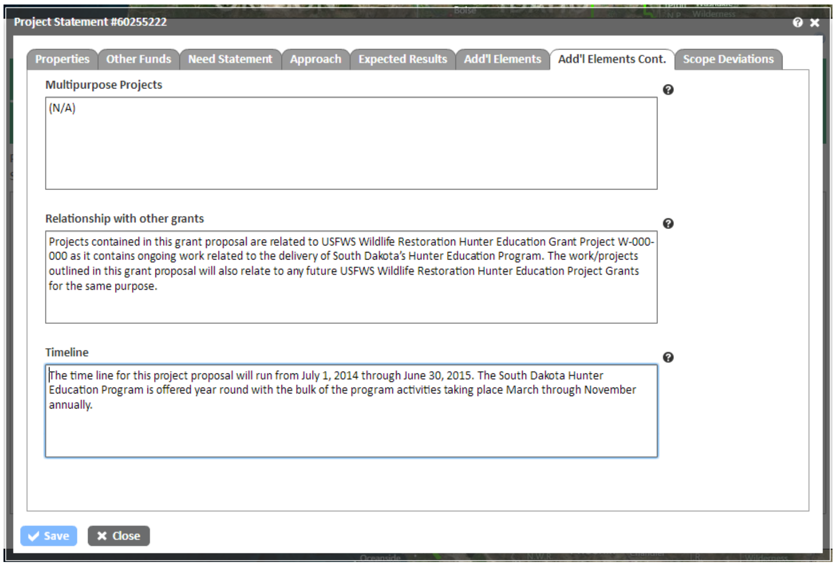
14. Enter information into the Additional Element fields as applicable.
    - **General:** general information about the project, such as compliance information
    - **Useful Life:** expected life of capital improvements with reference to method used to determine it.
    - **Program Income:** estimated program income amount and method.



Project Statement Additional Elements Cont. Tab

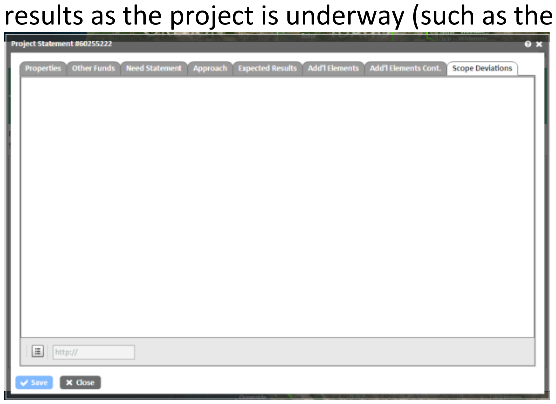
15. Enter information into the Additional Element Continued fields as applicable.

- **Multipurpose Projects:** describes activities related to another grant or not related to a grant.
- **Relationship with other grants:** relationship between the project and other work funded by federal grants.
- **Timeline:** an estimated schedule of significant milestones towards completing the project.



Project Statement Scope Deviations tab

16. Enter the Scope Deviation if applicable. This field is used to describe changes in the scope that results as the project is underway (such as the reason for an amendment).



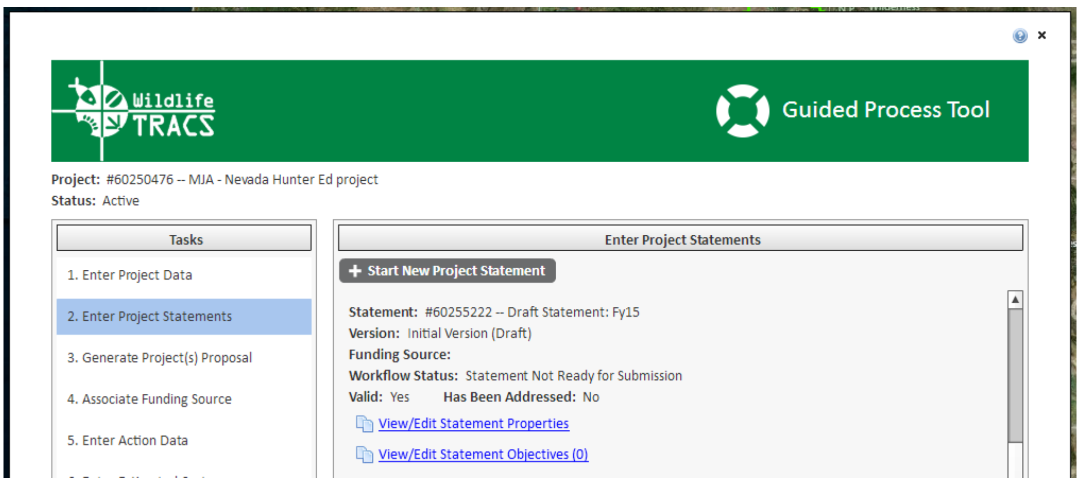
Save and Close

17. Click the Save and OK button. Click the Close button to close the Project Statement form. You will be directed back to the **Guided Process Tool**. Use the links on the right side to view or edit the project statement.

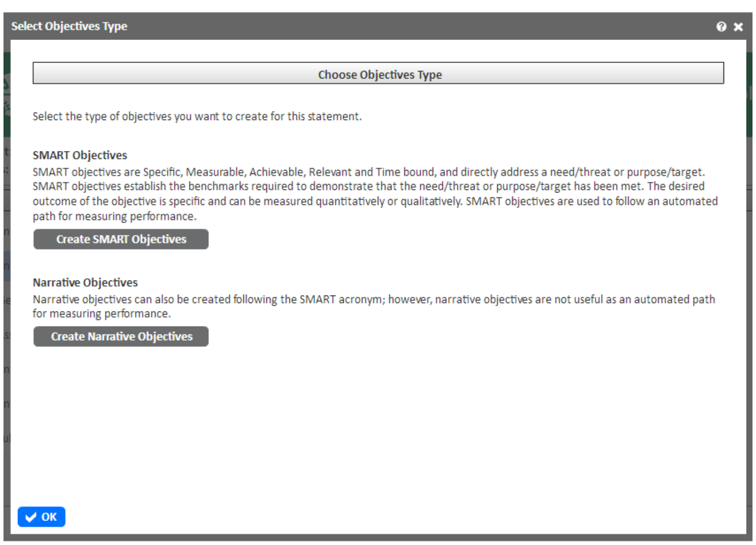
Lesson 5: Entering Project Objectives

This chapter will demonstrate how to enter project objectives into TRACS. Project objectives are the specific steps required to accomplish project goals and provide benchmarks for reporting. The objectives that are identified are the outputs of the project and become the actions that are reported upon. Therefore, they are considered the primary indicators of progress.

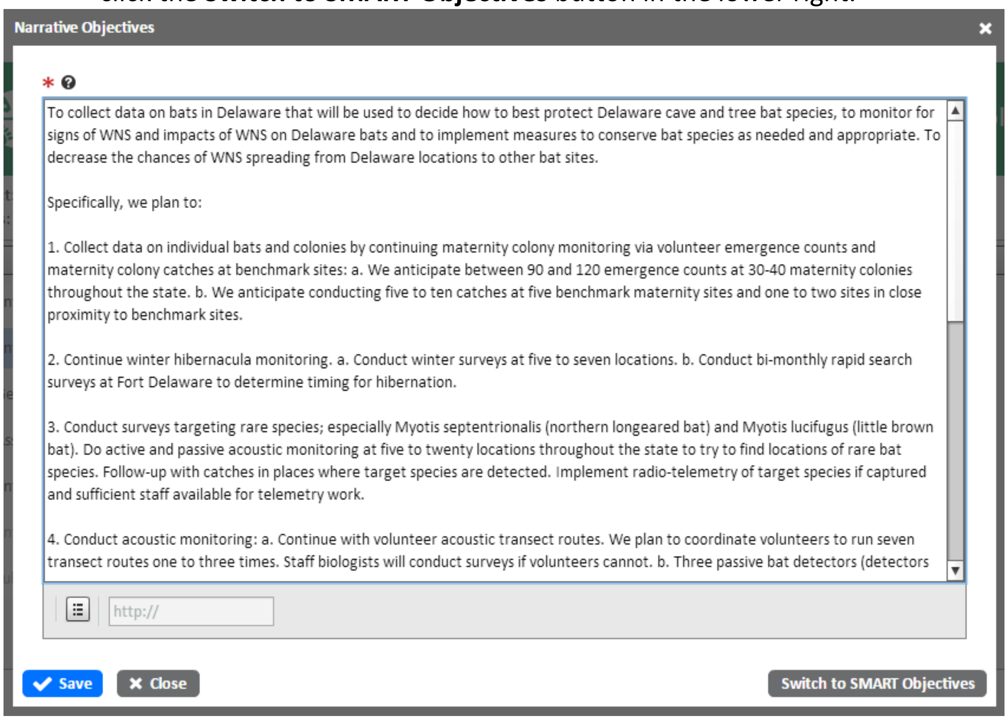
1. From the Guided Process Tool, click **2. Enter Project Statements** in the task panel on the left. Then click the **View/Edit Statement Objectives** button located in the right panel.



2. Click the **Create SMART Objectives** button. **SMART Objectives** are the preferred method because they establish benchmarks for measuring performance.

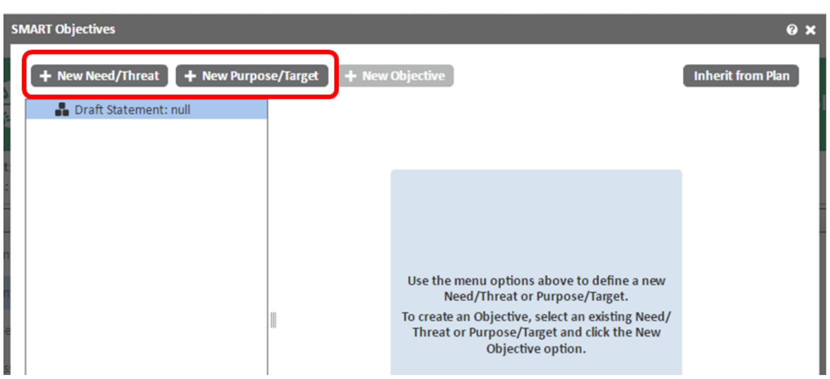


- NOTE: There is also an option to **Create Narrative Objectives,** which can be used if a SMART objective cannot be created.
    - In the Narrative Objectives window, simply enter or copy/paste the entire narrative for all objectives and click **Save**. NOTE: The narrative objectives window will only be filled out once to include all objectives.
    - Keep in mind that while it is a simpler process to enter objectives in the narrative format, the SMART objective format is preferred because it provides standardized outputs and benchmarks for measuring performance. To change to a SMART format, click the **Switch to SMART Objectives** button in the lower right.



3. From the SMART objective window, select either the **New Need Threat** or **New Purpose Target**.
    - Select the **New Need/Threat** button to indicate the reason for the objective if not related to a specific species/habitat.

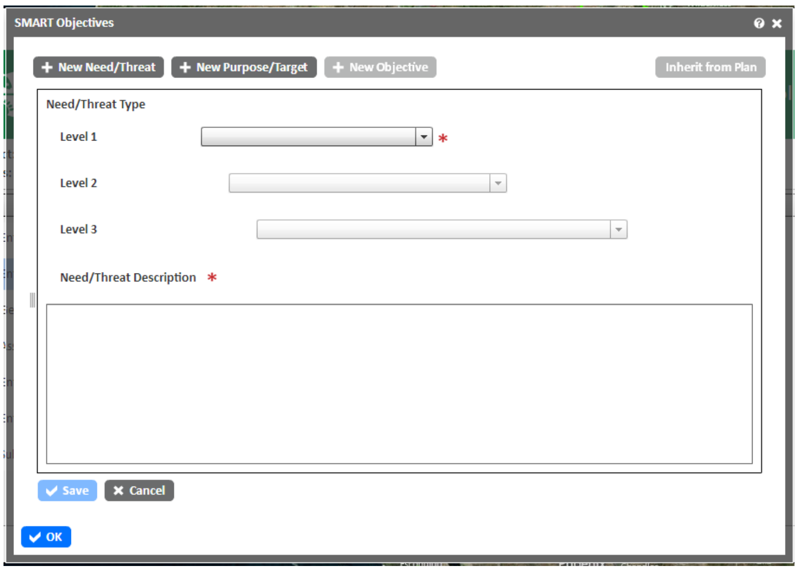
    OR
    - Select the **New Purpose/Target button** to indicate specific species or habitat(s) targeted by the objective.



4. Fill out the Need/Threat or Purpose/Target form to identify the reason for the objective(s).

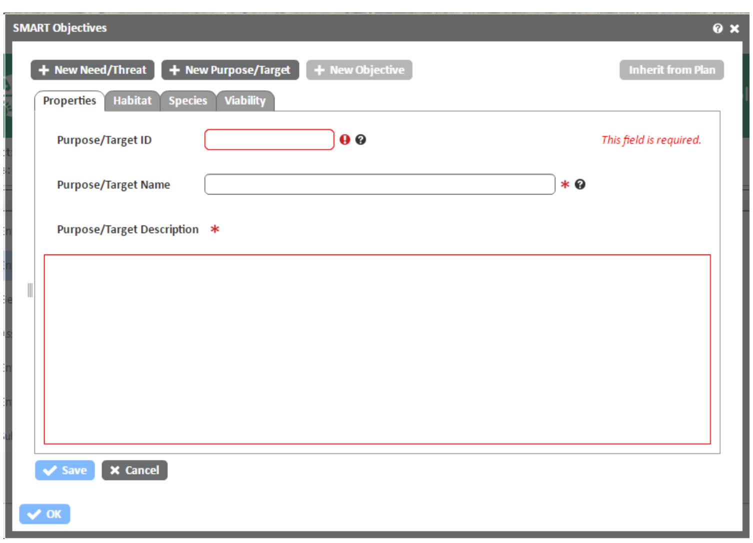
New Need/Threat:

- Select a Level 1 **Need/Threat Type** from the drop downs that best describes the need for the objective(s), e.g. resource management need. **Note:** Level 2 & 3 are optional but should be filled out if possible.
- Fill in the Need/Threat description.



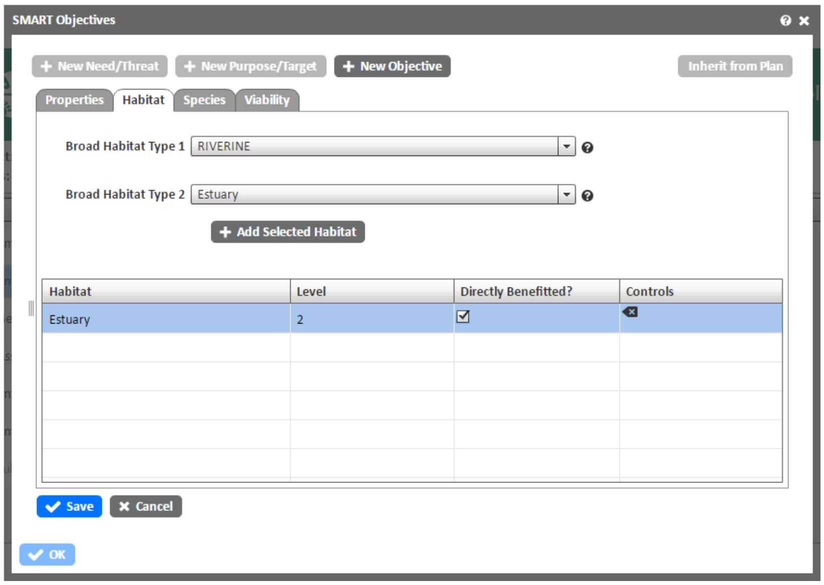
New Purpose/Target:

- Enter the Purpose/Target ID (e.g. a numbering system such as 1, 2, 3 or A, B, C etc.)
- Enter the Purpose/Target Name
- Fill in the Purpose/Target description.



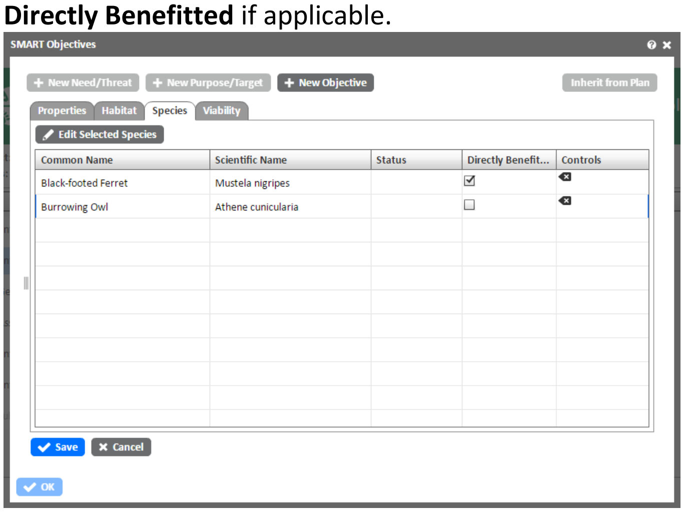
Habitat tab:

- If applicable, select the Broad Habitat Type 1 & 2 from the drop down menus (Type 1 determines the options available to specify type 2).
- Click **Add Selected Habitat** to add it to the table below. Check the box for **Directly Benefitted** if applicable. To remove a habitat from the list, click the x button in the Controls column.



Species tab:

- If applicable, click **Edit Selected Species** to edit or add a species to the list. Check the box for **Directly Benefitted** if applicable.

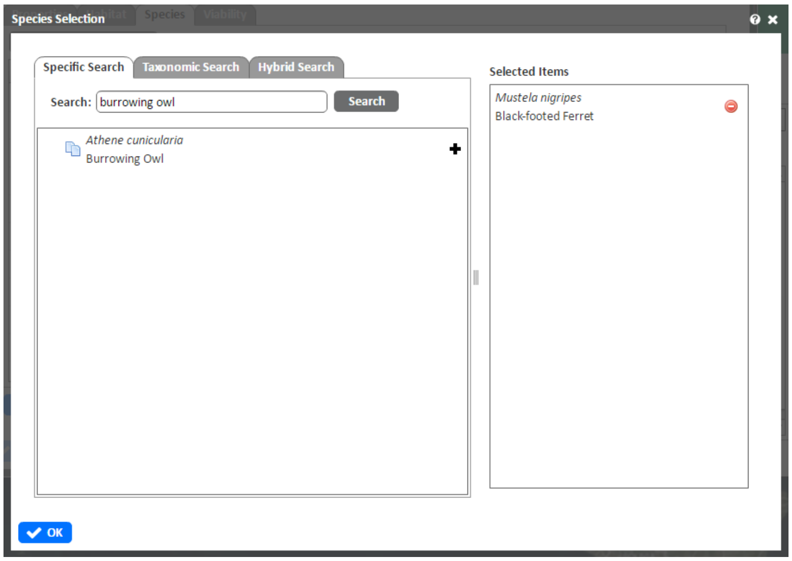


- Search for the species using the search tabs:
  - **Specific Search tab:** enter part of the common name or scientific name and click Search.
  - **Taxonomic Search tab:** select the taxonomic level (e.g. genus) and enter the name in the search field. Click on the + sign to expand the menu and select the level to add before clicking the + sign to move the item over to the right side.

- **Hybrid Search tab:** search for the species and click the plus sign (+) to add the two species to the Species 1 and 2 boxes (e.g. add a tiger and a lion to create a liger).

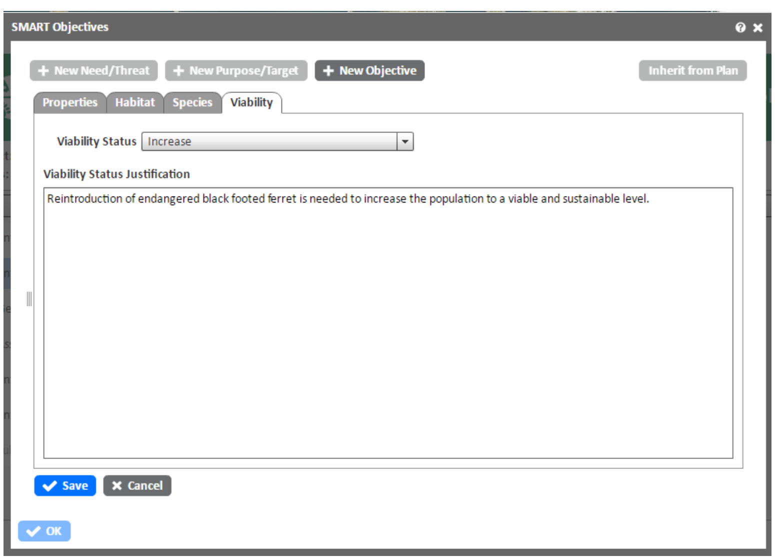
- Click the plus sign to add a species to the Selected items on the right side (or click on the red minus sign to remove a species).

- Click OK to return to the previous screen.



Viability tab:

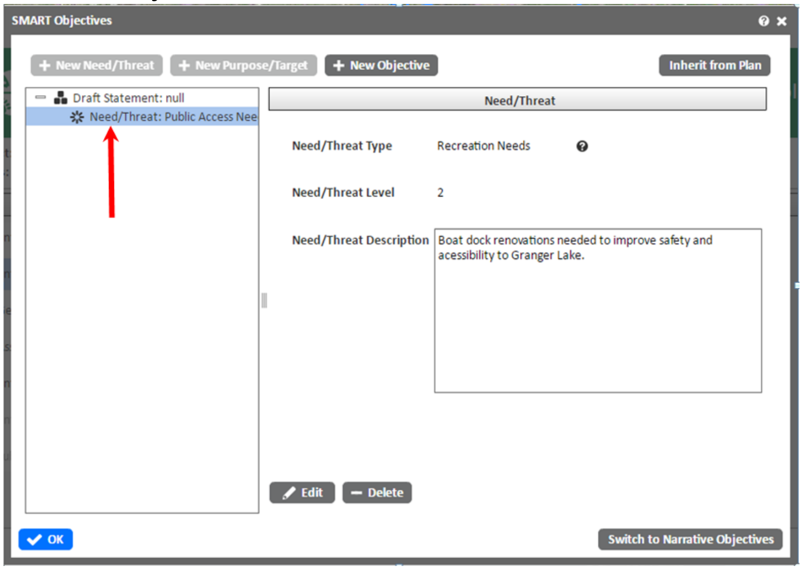
- **Viability Status:** select the status if applicable (Increase, Decrease or Sustain)
- **Viability Status Justification:** provide an explanation of the status



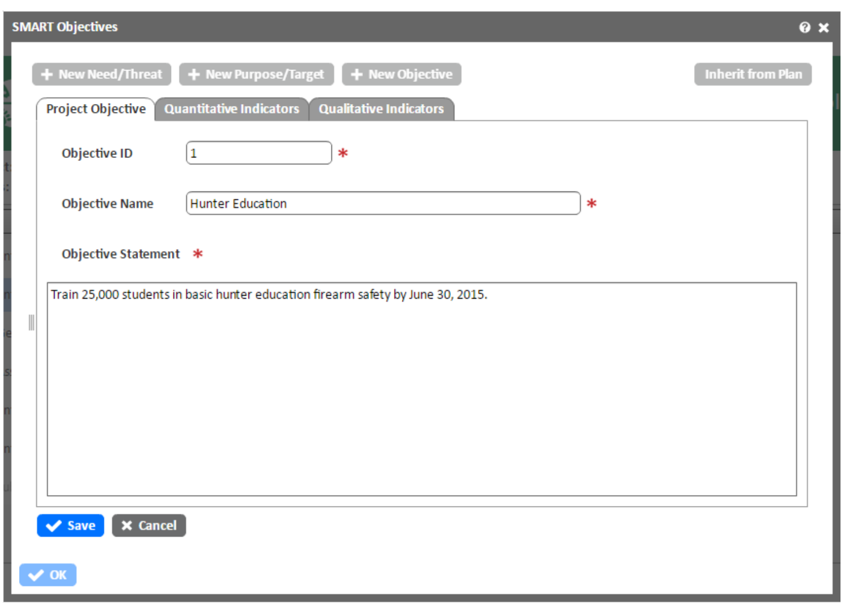
5. After adding the Need/Threat or Purpose/Target, click the **Save** button.

6. Expand the **Project Statement** tree in the left panel by clicking the (+) sign. Click the newly created **Need/Threat** or **Purpose/Target** in the left panel.

7. The **New Objective** button will become active and can be selected.

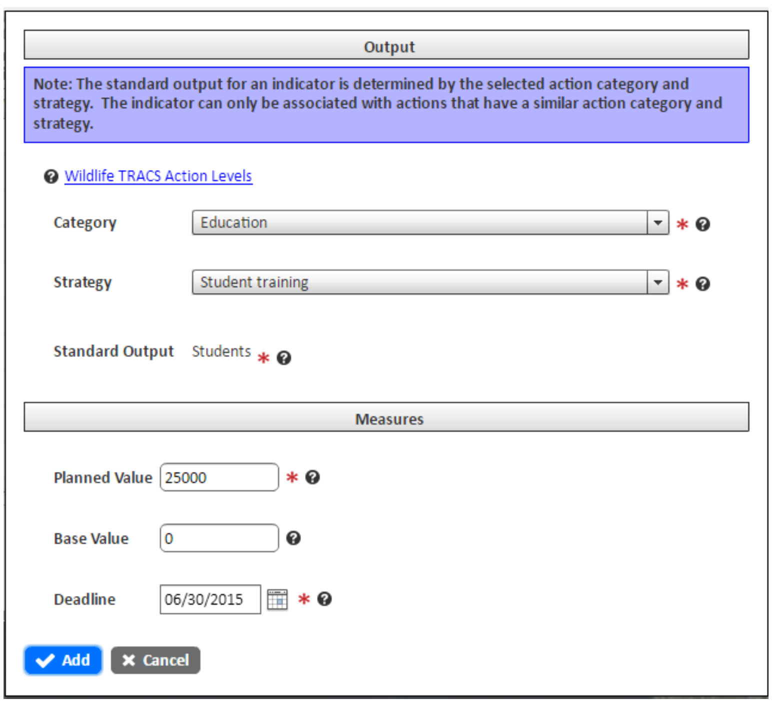


8. Fill in the required **Project Objective** fields.
   - **Objective ID** (follows a numbering system such as 1, 2, 3 or A, B, C or another state-used ID)
   - **Objective Name:** short title
   - **Objective Statement:** best practice: enter as "(Action verb) _____ (how many) _____ (who or what) _____ (by when) _____." E.g. Train 25,000 students in basic hunter education firearm safety by June 30, 2015.

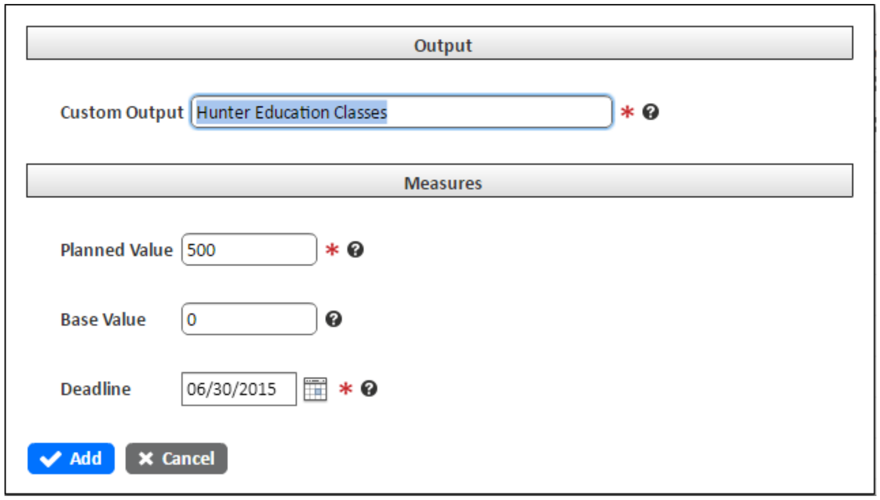


9. Go to the **Quantitative Indicator** or **Qualitative Indicator** tab to add one or more indicators to track progress on the completion of the objective.
    - **Quantitative Indicators** are used for measurable outcomes (i.e. number of acres)
    - **Qualitative Indicators** are used for all objectives that do not have a measurable component (such as Administrative Support) and tracks whether it was completed or not (i.e. True or False)

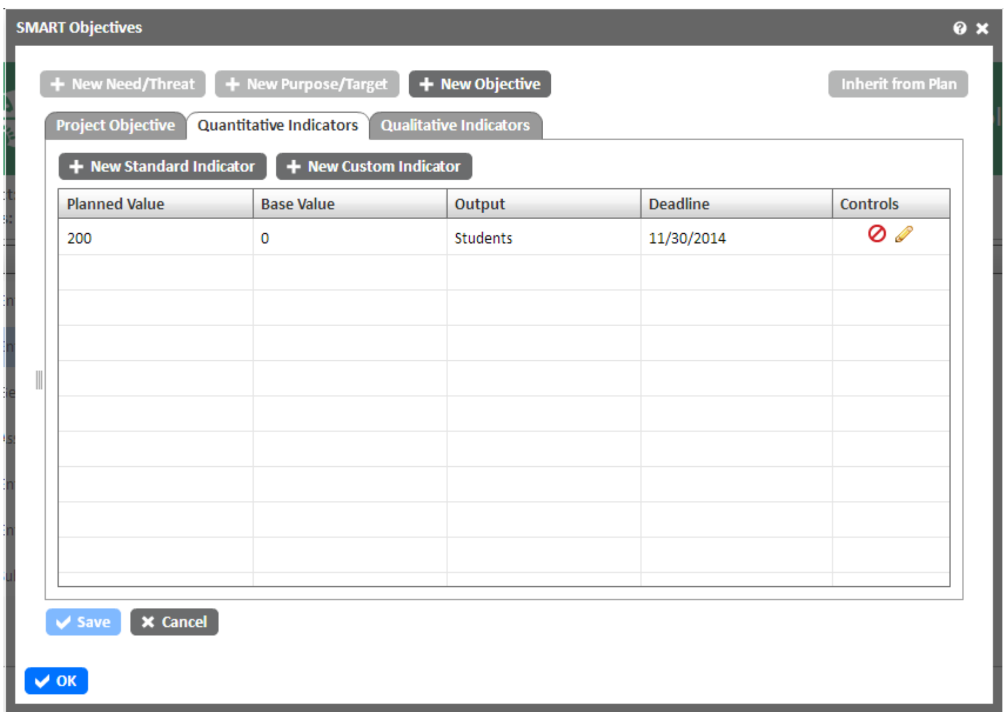
10. Add the indicator(s) that will be used to measure the completion of the objective.
    - Click the **New Standard Indicator** button to select an existing standard indicator.
        - Select the Category and Strategy to use a standard output built in TRACS (the standard output unit will display, such as acres)
        - Enter the **Planned Value** (how many are estimated to be accomplished, such as number of acres to be restored)
        - Enter the **Base Value** (starting point, usually zero unless the project is a continuation)
        - Enter the **deadline** (when you plan to complete this objective or the project end date)
        - Click **Add**



    - Click the **New Custom Indicator** button to add a new custom indicator. This option is used if a standard indicator is not available.
        - Enter the **Custom Output** (e.g. number of aquatic education classes taught)
        - For Quantitative Only: enter the Planned Value and Base Value.
        - Enter the Deadline
        - Click **Add**



11. The indicator table has been added when it appears in the grid. Click the **Save** button to save the **Objective**. Click the **OK** button to close the **Objective** form.



Lesson 6: Generating a Proposal

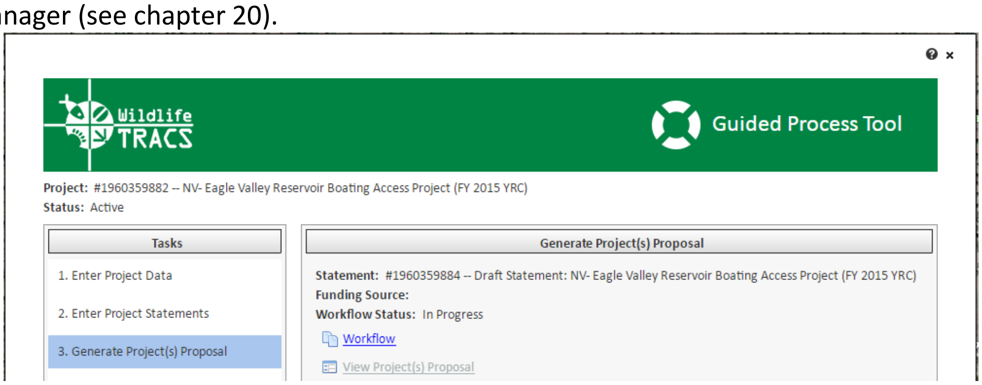
This chapter will demonstrate how to generate a project proposal in TRACS and send it through the approval process. Grant funding approval is separate from the project approval process that is done in TRACS. The process in TRACS provides a standardized format for state and federal review and is required for *performance reporting.*

It is important to note that after you submit your project proposal for review and approval in TRACS, you will not be able to change much of your core data; so be sure to double check your work before you do.

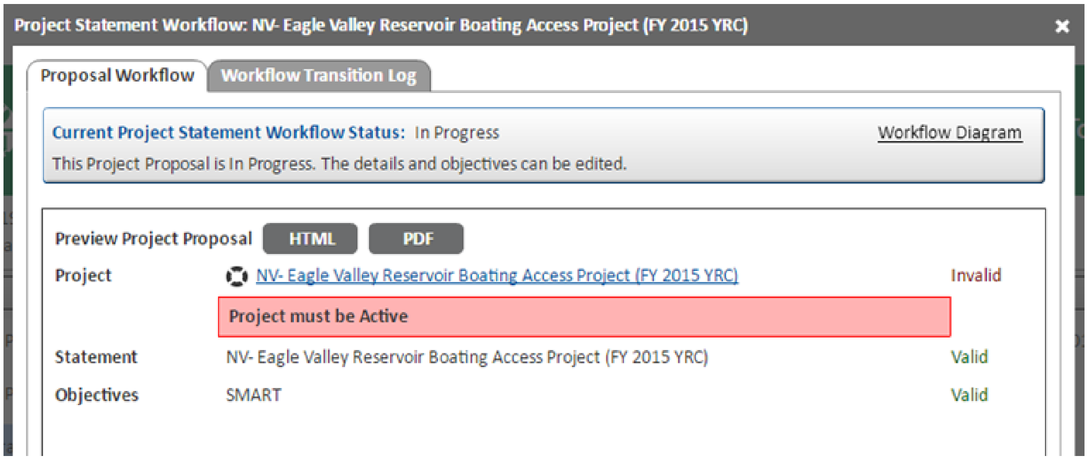
Tip: If you have been working in draft mode, you will need to change the project status to active by returning to **Task 1 Enter Project Properties** and click **View/Edit Project Properties**.

1. From the Guided Process Tool, click **3. Generate Project(s) Proposal** link located in the **Tasks** panel. Click on the **Workflow** link located in the right panel.

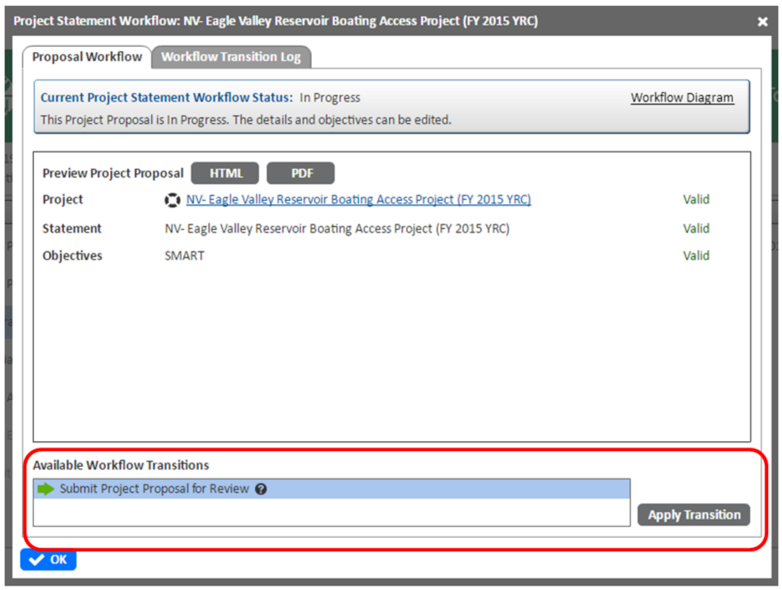
   Tip: This workflow must be completed separately for each project statement. To push multiple projects statements through the approval workflow at the same time, use the Workflow Manager (see chapter 20).



2. The Workflow window opens.
   - The "Current Project Statement Workflow Status" will display in the gray box at the top of the window. You can view a small version of the **Workflow Diagram** by clicking the **Workflow Diagram Link** located at the top right of the window.
   - Select the **HTML** or **PDF** buttons to view or download a preview of the proposal.
   - The system will check the project, statement and objectives to ensure that all required fields are complete. If all of the required fields are complete, the status will display as "valid". If the status is invalid, an error message will display. This message will disappear once the error has been fixed.

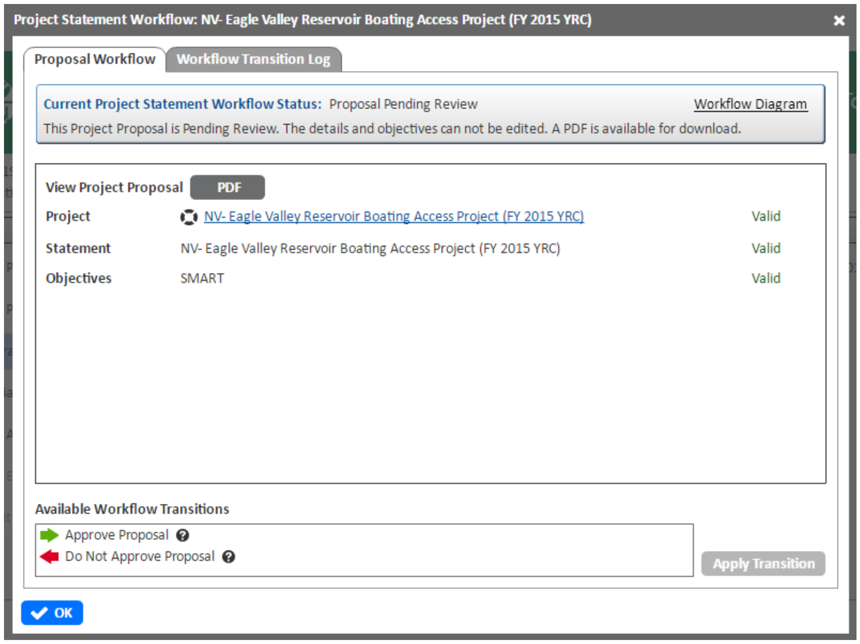


3. To submit the project for review, select **Submit Project Proposal for Review** and click the **Apply Transition** button in the “Available Workflow Transitions” box at the bottom of the window.

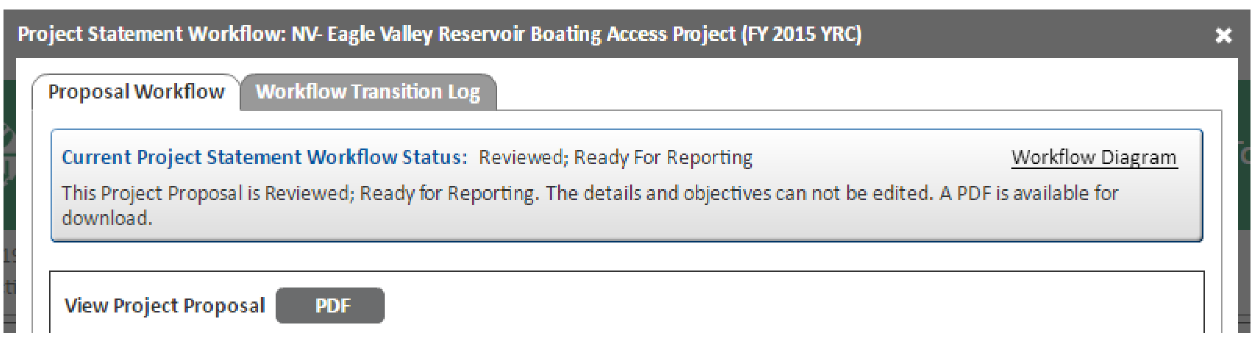


4. The status at the top of the window will display as “Proposal Pending Review”. The federal reviewer is responsible for completing the review. He/she will then select “Approve Proposal” or “Do Not Approve Proposal” and click **Apply Transition**.

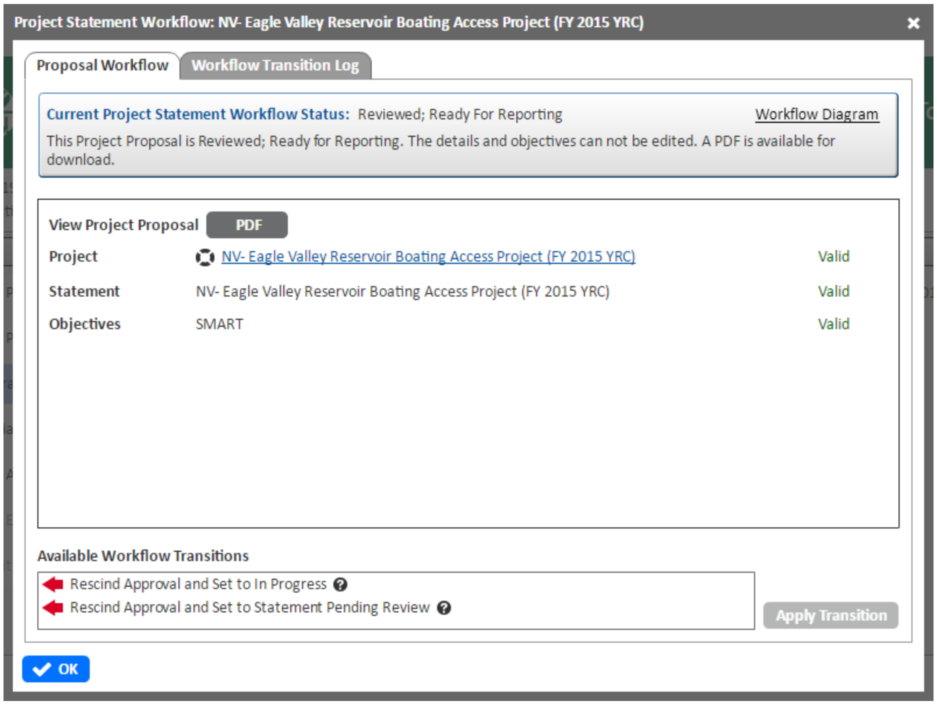
   Note: The system does not currently send automatic notifications, so you will need to follow-up with the reviewer to let them know when the project is pending their review. Likewise, the federal reviewer should contact the editor to let them know if the project is approved or not and if any revisions are needed.



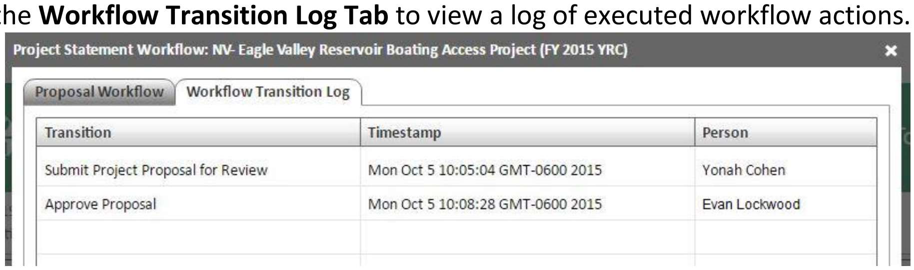
5. Once the project proposal has been approved, it will display with the status "Reviewed Ready for Reporting" at the top of the window. The Proposal can be viewed or downloaded by selecting the PDF button. (Note: The HTML preview is no longer available).



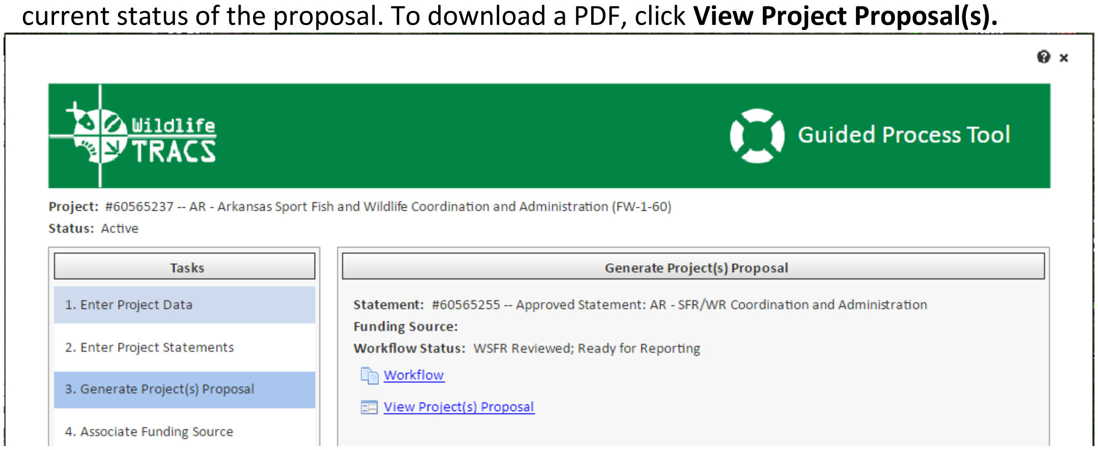
6. If the data needs to be edited after the proposal has been approved, contact the federal reviewer to rescind approval. The federal reviewer can select "**Rescind Approval and Set to In Progress**" (and click **Apply Transition**) which allows the state editor to make any changes and submit the project for approval again. The other option is to select "**Rescind Approval and Set to Statement Pending Review**" which allows the federal reviewer to make changes.



7. Click the **Workflow Transition Log Tab** to view a log of executed workflow actions.



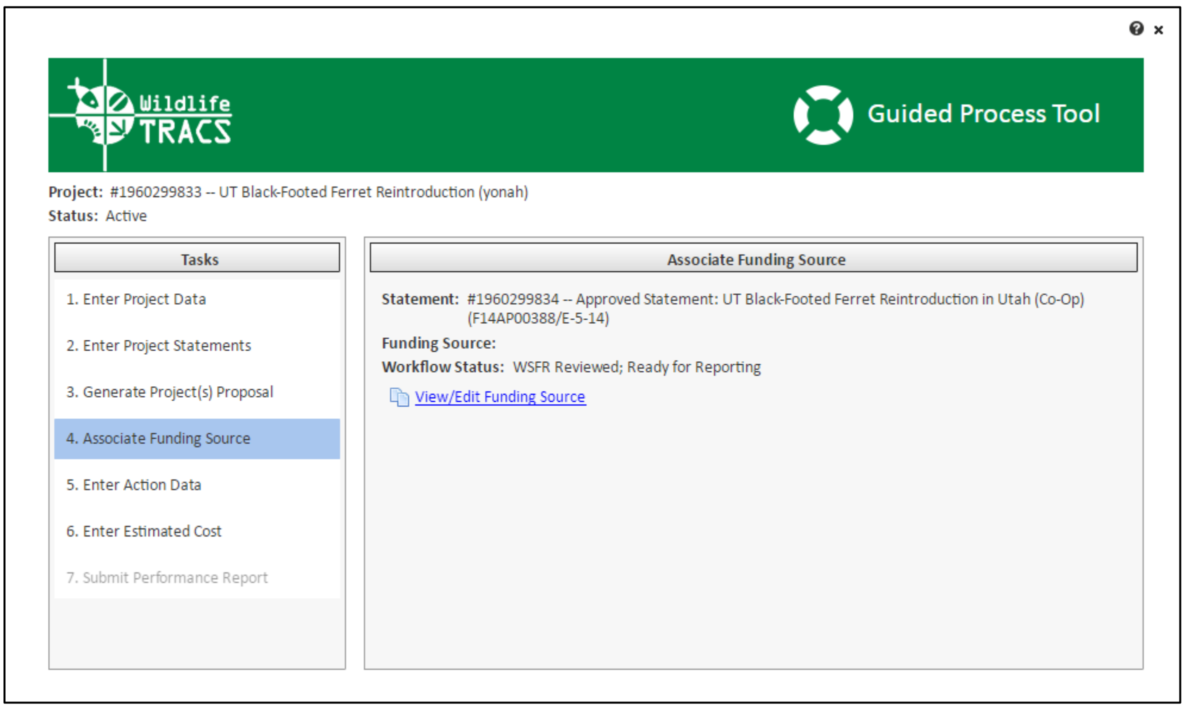
8. Click the **OK** button to close the **Workflow** form. The Guided Process Tool will display the current status of the proposal. To download a PDF, click **View Project Proposal(s).**



Lesson 7: Associating a Funding Source

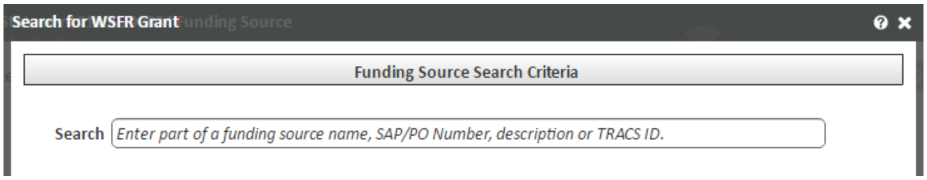
This chapter will demonstrate how to associate a funding source to your project in TRACS. The funding source is the grant award that is linked to your project and is required for reporting purposes. Associating a grant funding source to a project statement in TRACS is a **WSFR-only function**. State personnel do not need to perform this step.

1. From the Guided Process Tool, click **4. Associate Funding Source** link located in the **Tasks** panel. Select the **View/Edit Funding Source** link displayed in the right panel.

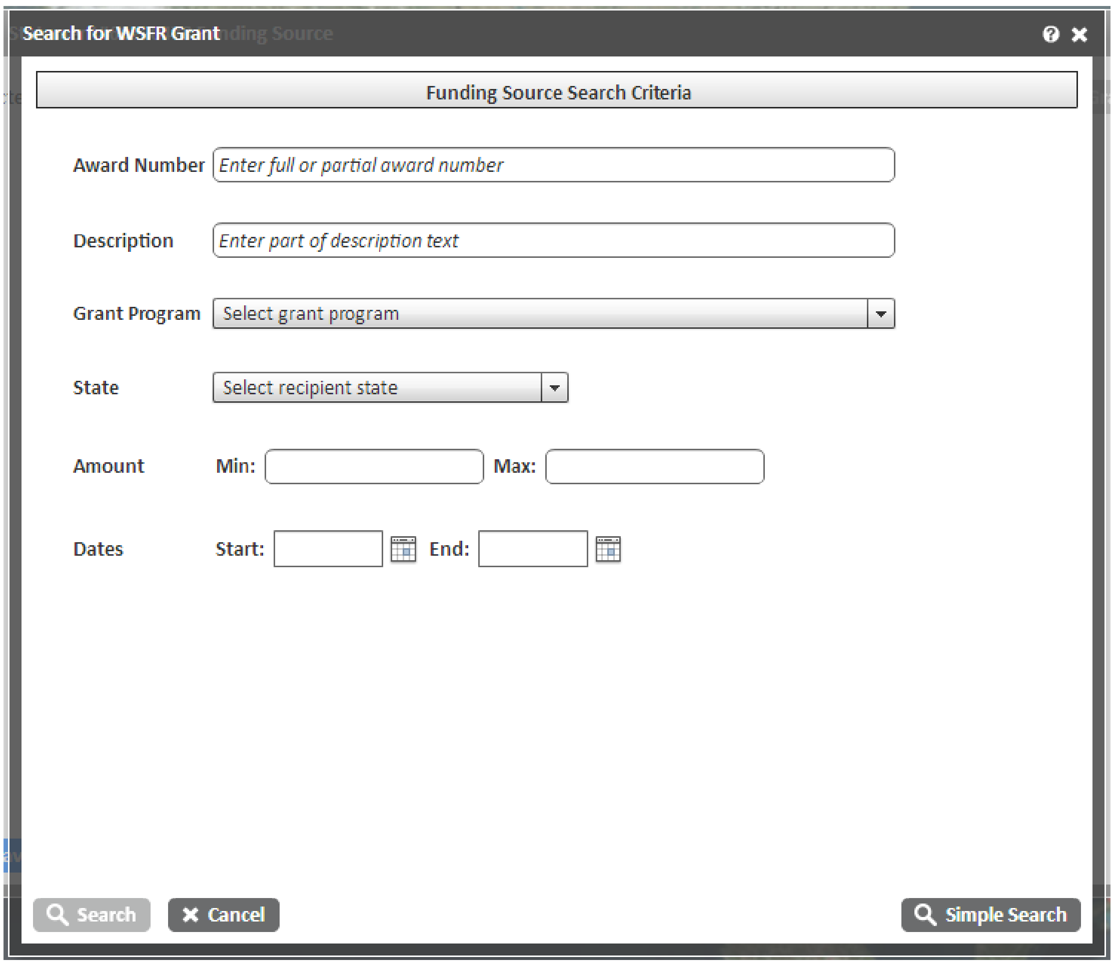


2. Select the **Find Grant** button (upper right).

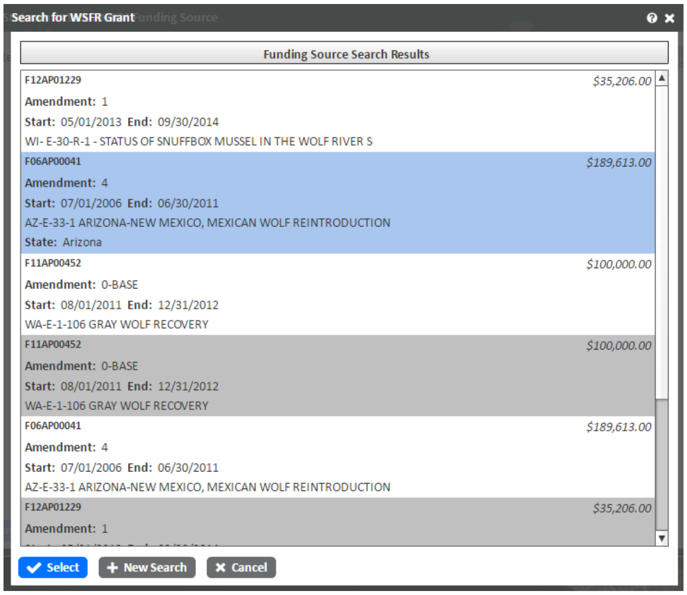
3. The search form displays. In the Search box, enter part of the funding source name, SAP/PO Number, description or TRACS ID. Click **Search**.



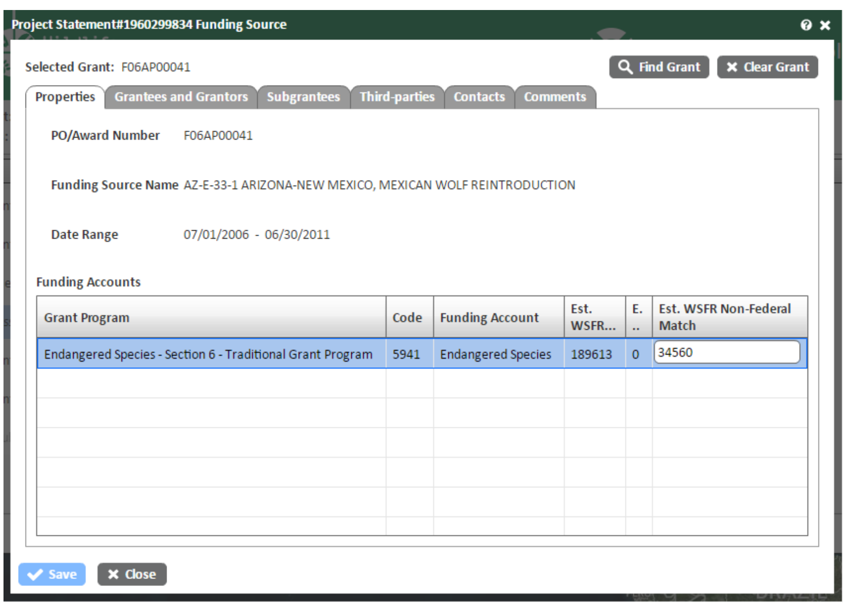
- Optional: Click the **Advanced Search** button in the lower right to add additional search parameters.



4. Click the desired funding source from the results list. If the desired award is not found, click the **New Search** button to modify your search parameters and search again. Click **Select** when the award is highlighted in blue.



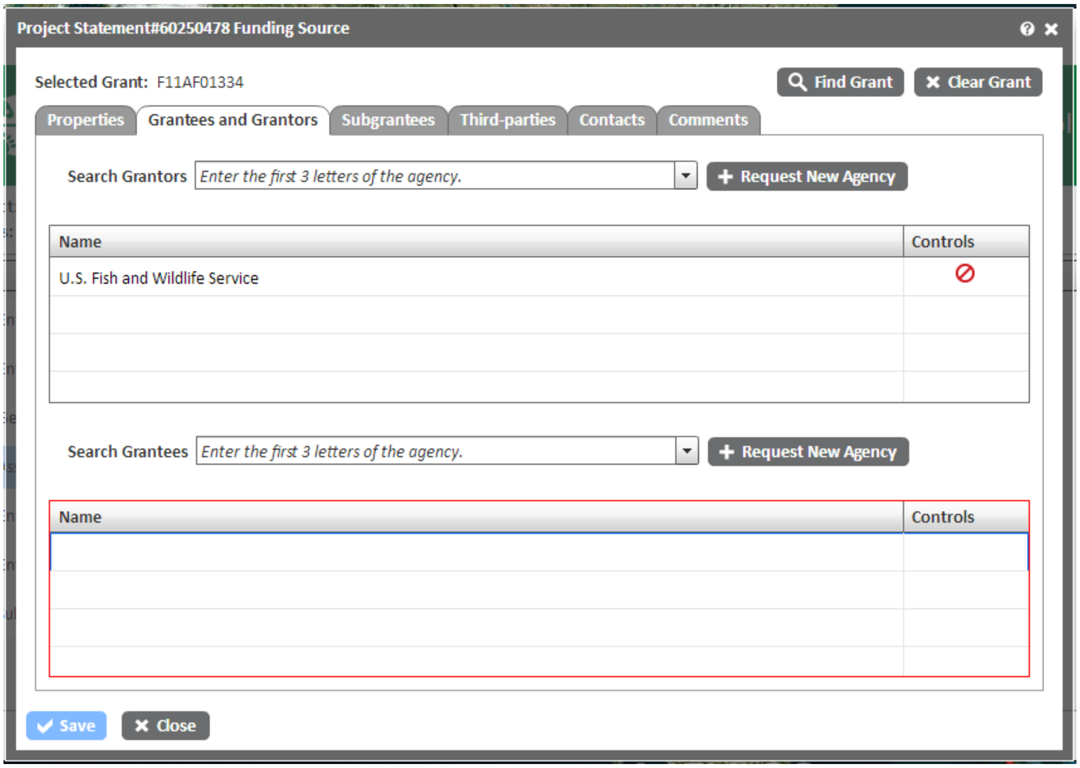
5. The **Project Statement Funding Source** form is displayed.
   - Enter the **Est. WSFR Non-Federal Match** dollar amount.
   - The **Funding Source** form data is shared by all **Project Statements** that utilize the selected funding source. Edits have the potential to impact other **Projects**.



6. Click the **Grantees and Grantors Tab**.
   - Select the **Grantors and Grantees** from the drop down lists by typing the first three letters of the grantor name and grantee name.
   - If no matches exist, select the **Request New Agency** button.

7. Fill out the Subgrantees, Third-parties and comments tabs if applicable.

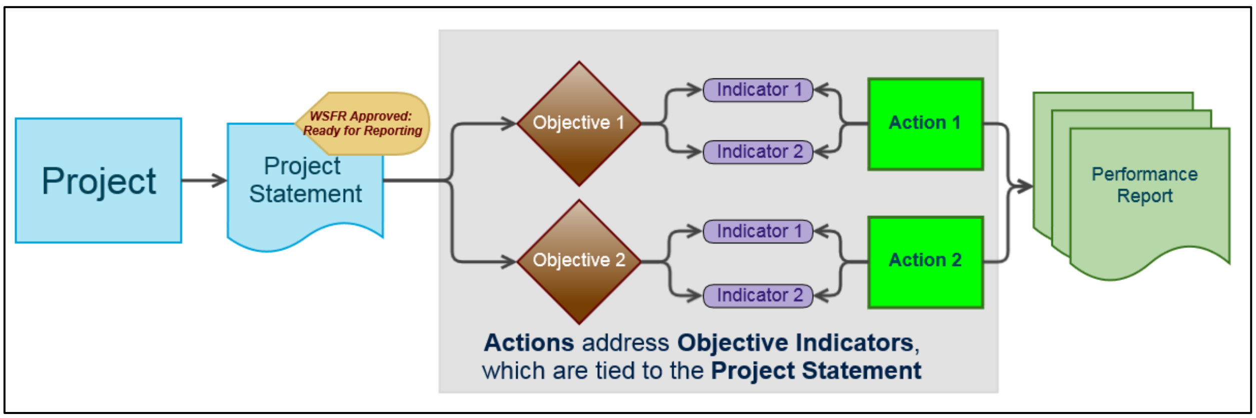
8. Click the **Save** button and then click **Close**.



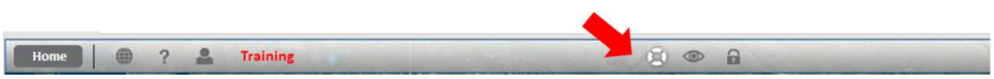
Lesson 8: Mapping and Entering Actions

This chapter covers how to map and enter actions in TRACS. An action is any work that is done to complete a project objective. All reporting is based on the completion of concrete, measurable actions. The data is important because it demonstrates how the grant funding was used to the public and our government.

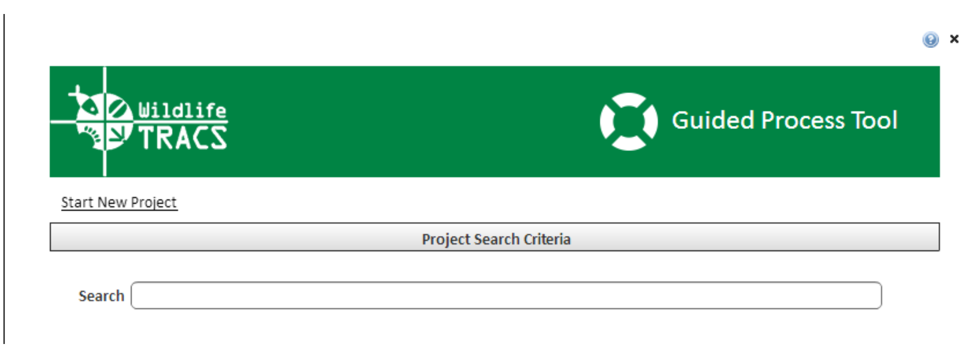
Performance reporting is done primarily through TRACS data fields at the Action level. Performance reports are created by adding actions that tie to the objectives and indicators set up in the project statement(s). This is where progress toward meeting objectives is documented in quantitative, qualitative or narrative fields. Estimated costs are entered at the action level and then the actions are bundled into the performance report, which is submitted for review/approval (state/federal).



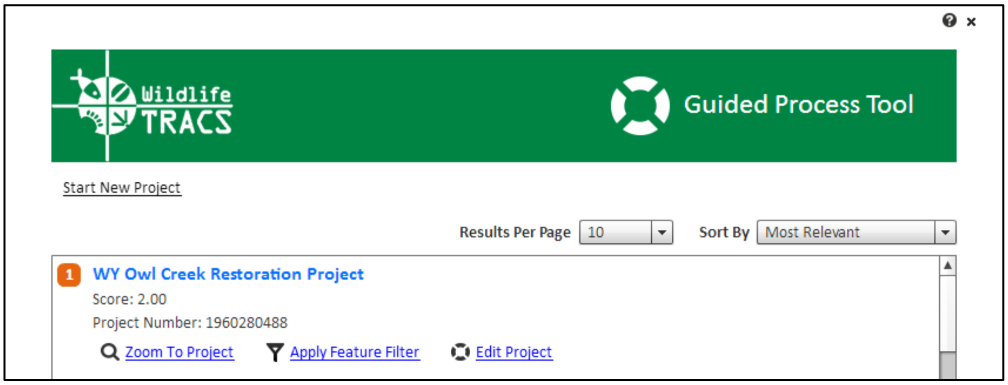
1. Select the **Guided Process Tool** from the **Mapper Toolbar** (top of screen).



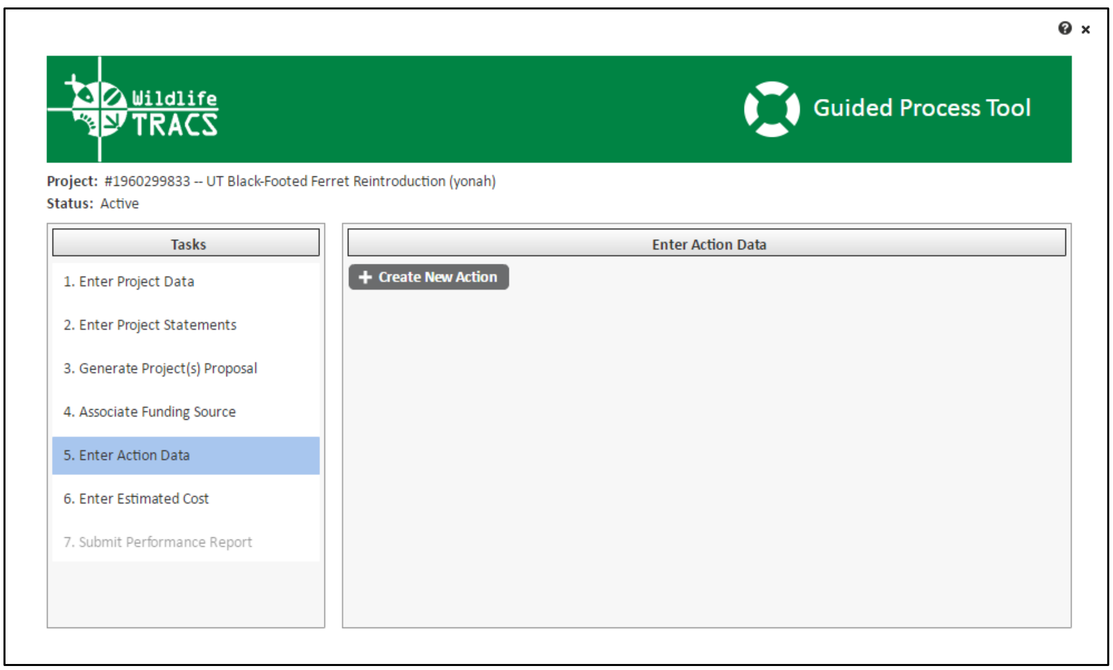
2. Enter the project name/number into the Search box and click **Search** (or use the Advanced Search).



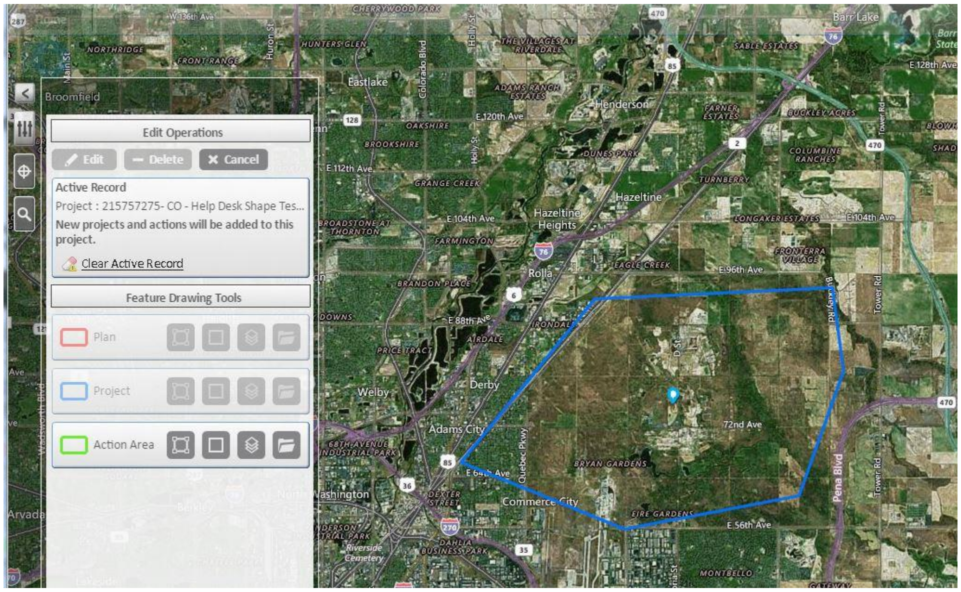
3. The search results will display.
   - Select **Zoom to Project** to zoom the map to the project location
   - Click **Apply Feature Filter** to filter the map to only view that project
   - Click **Edit Project** to open the Guided Process Tool for the selected project



4. Click **5. Enter Action Data** link in the **Tasks** panel of the Guided Process Tool. Click the **Create New Action** button located in the right panel.



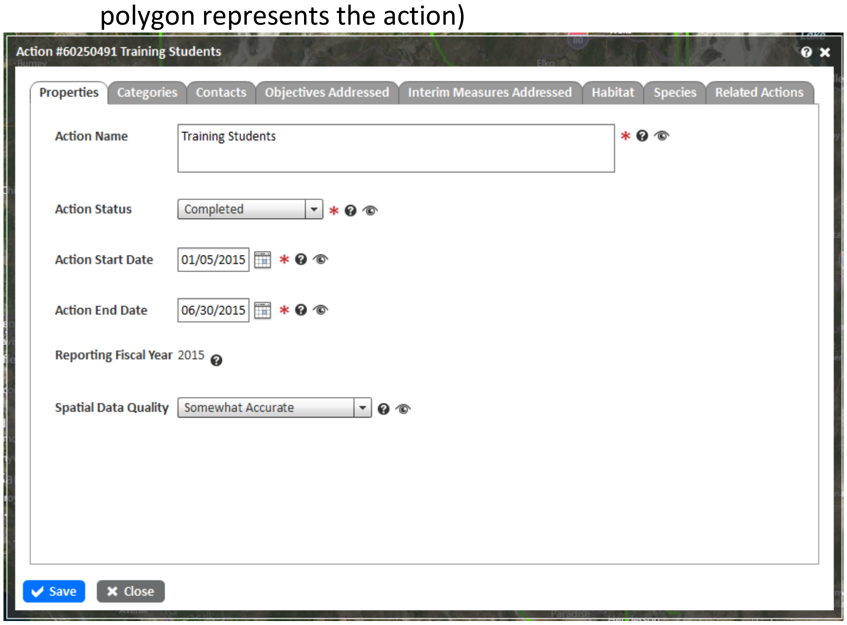
5. The Feature Editor window will open on the left. Select the one of the feature drawing or selection tools for the action (review chapter 2 for general information about the drawing tools). See the next sub-chapter on how to **Copy the Project Shape as the Action Shape**.



6. Click the **Save** button in the **Feature Editor** when the polygon is complete. The Action form will open.

Action Properties Tab

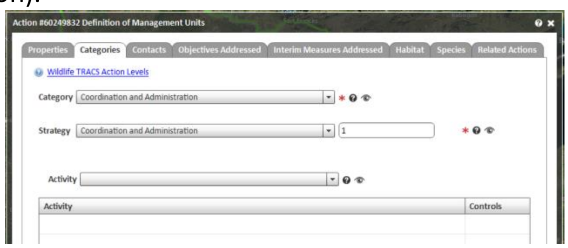
7. Enter the **Action Name**
8. Select an **Action Status** (e.g. Draft, Active, Completed).
    - The **Draft** status is used initially and allows you to save the form at any time.
    - For interim reports, the actions that will be included must have a status of **Active**.
    - For the final report, all of the actions must have a status of **Completed.**
9. Enter the **Action Start Date** and **End Date** (the "Reporting Fiscal Year" will auto populate based on the dates)
10. Select an option from the **Spatial Data Quality** drop down box (select how accurately the action polygon represents the action)



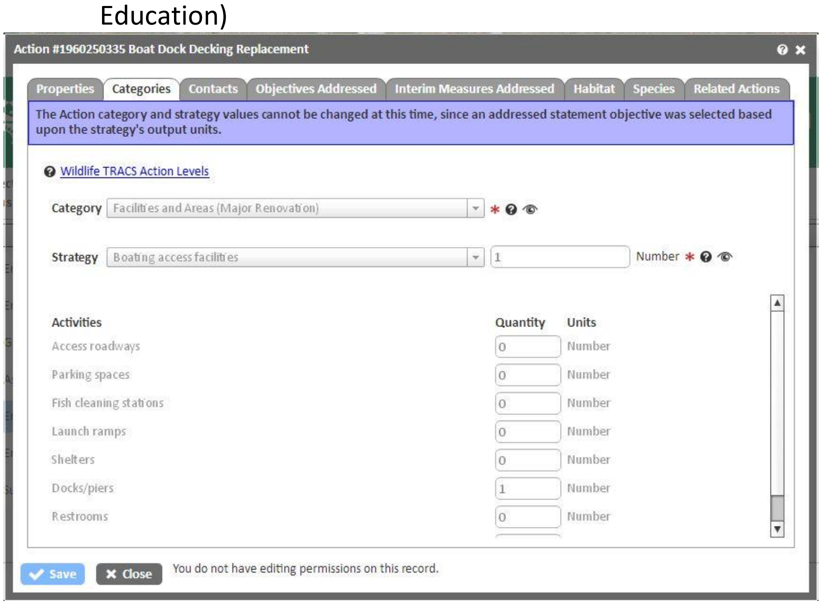
Action Categories Tab

TRACS contains action categories, strategies and activities that are used for "roll-ups" that aggregate data for national reporting.

11. Select the **Category** from the drop down list (e.g. Data Collection and Analysis).
    - Select the **Strategy** from the drop down list (e.g. Research, survey or monitoring-fish and wildlife populations).
    - Enter the output associated with the selected **Strategy** unit (e.g. 20 projects, 1 database, etc.).
    - Select the **Activity** from the drop down list, if applicable (e.g. Abundance determination).



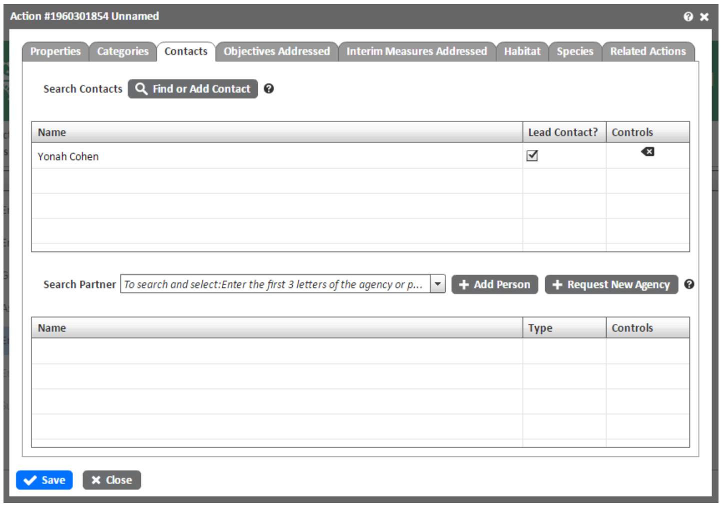
- Below is another example of the Action Categories Tab with Category, Strategy and Activities (Activities only required for Boating Access and Aquatic/Hunter Education)



Action Contacts Tab

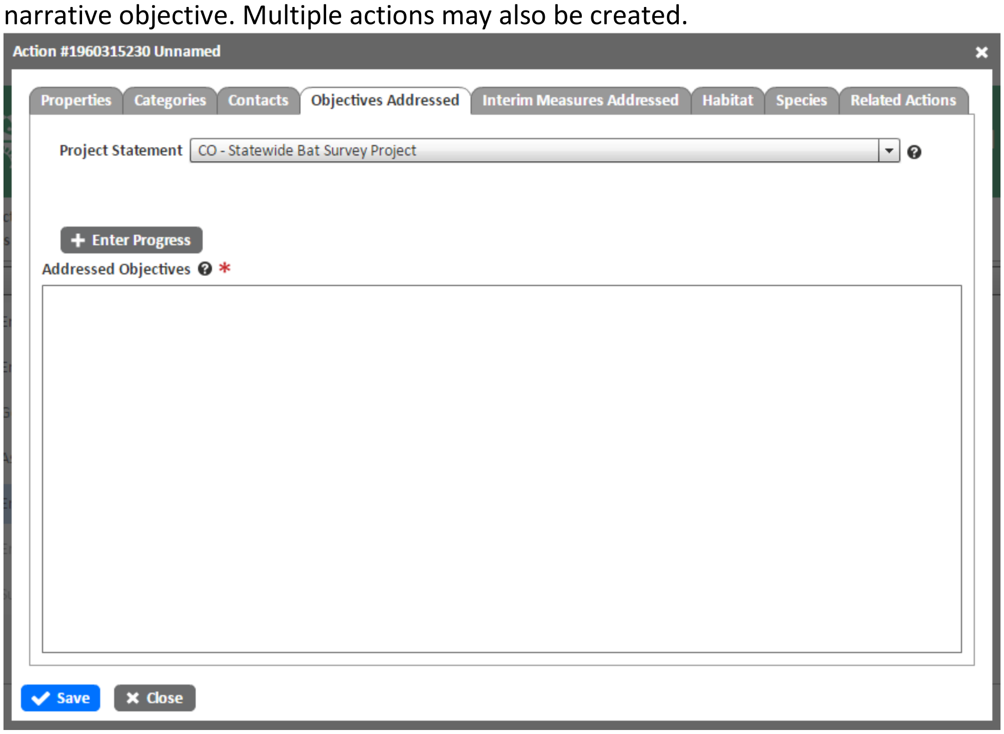
12. Contacts should auto-populate from the project form. Add any missing contacts by clicking **Find or Add Contact**.

13. Add partners if applicable from the **Search Partner** drop down list by typing the first three letters of the **Partner Name** (e.g. Arizona Mollusk and Nature Resources).

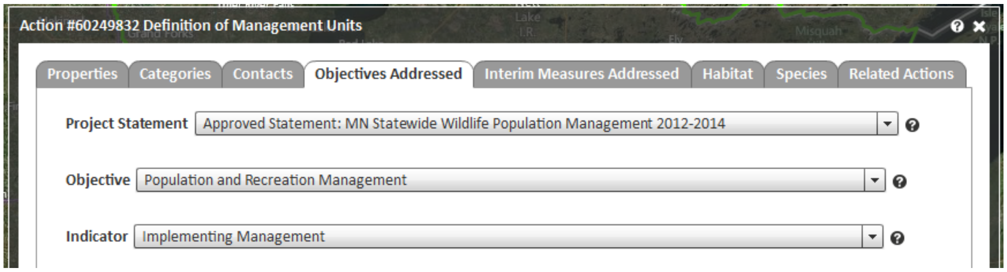


Action Objectives Addressed Tab

14. Select a **Project Statement** from the drop down list.
    - If the narrative objectives were used, click on the **Enter Progress** button. Fill out the date reported, results and significant deviation (if applicable), then click **Add**. NOTE: **Enter Progress** can be clicked repeatedly to add more result information for the narrative objective. Multiple actions may also be created.

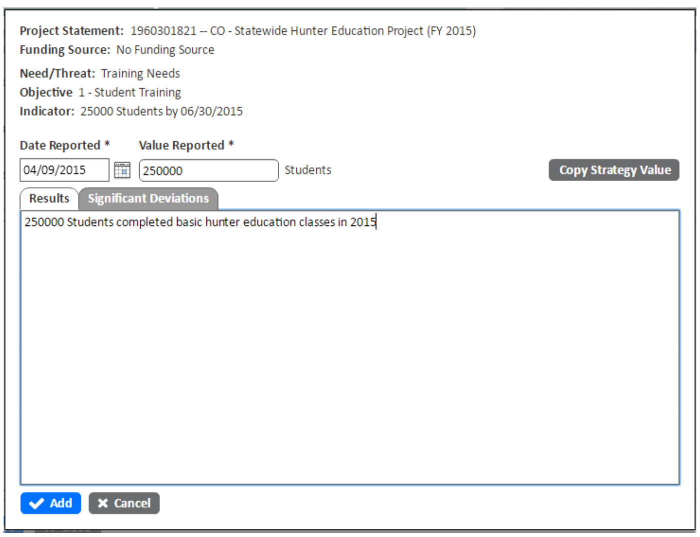


    - For a SMART Objective, select the applicable **Objective** and **Indicator** from the drop down lists.

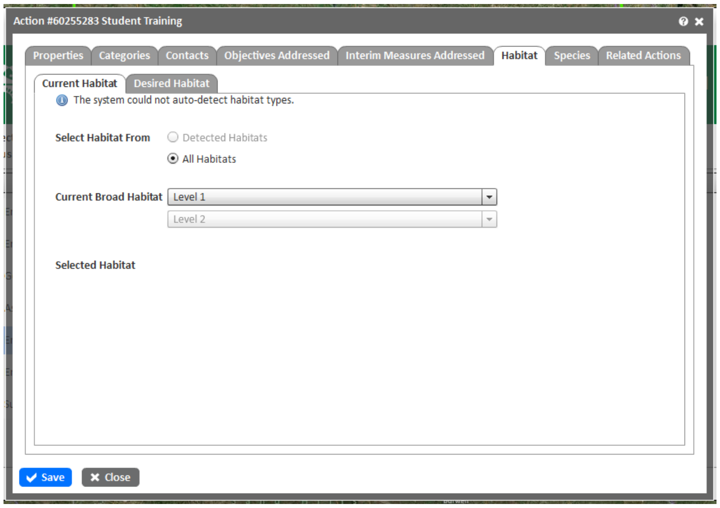


When the pop-up window appears, complete:

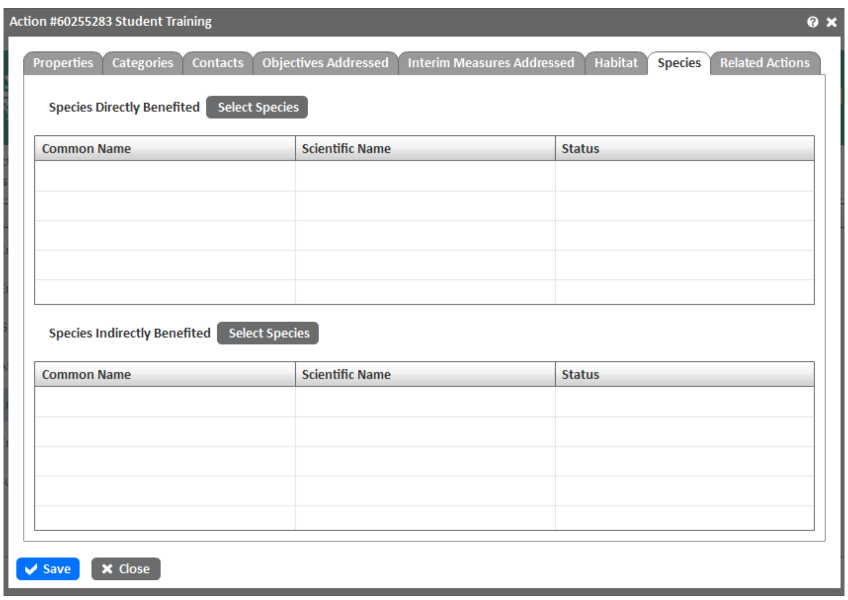
- **Date Reported**
- **Value Reported** (use **Copy Strategy Value** button on right to copy the value originally entered in the objectives)
- **Results:** fill out the results (or copy and paste)
- If an empty box appears on the right, select "True" or "False" from the drop down (appears with qualitative indicators only and is used to determine if the objective was completed)
- Click over to the **Significant Deviations Tab** to add items, if necessary.
- Click the **Add** button to add the progress report.



15. Click the **Save** button to save the **Action** form. Click the **OK** button to confirm.
16. Interim Measures Addressed Tab (optional - see the Interim Measures section)
17. Habitat Tab – fill out if applicable
    - Select the **Current Broad Habitat** from drop down list on the **Current Habitat Tab** (e.g. Desert Scrub).
    - Select the **Desired Broad Habitat** from drop down list on the **Desired Habitat Tab**



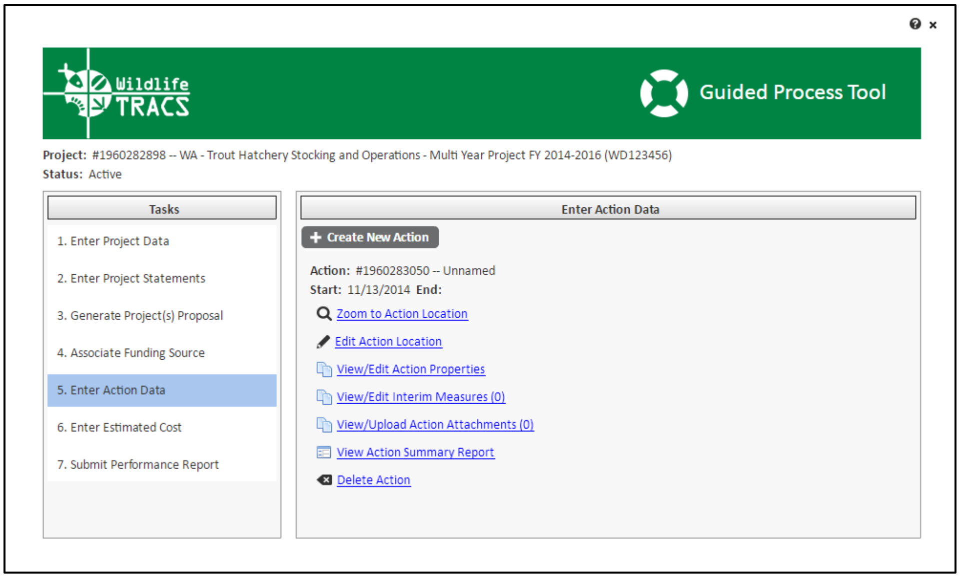
18. Species Tab – fill out if applicable
    - In the **Directly** or **Indirectly Benefitted Species** sections click **Select Species.** Search for the species and add by clicking the plus sign.



19. **Related Actions Tab** – fill out if applicable to display relationships with parent or related actions.

20. Click **Save** and **Close** to return to the Guided Process Tool**.**

21. Use the buttons on the right to view, edit, delete or attach attachments to the action.

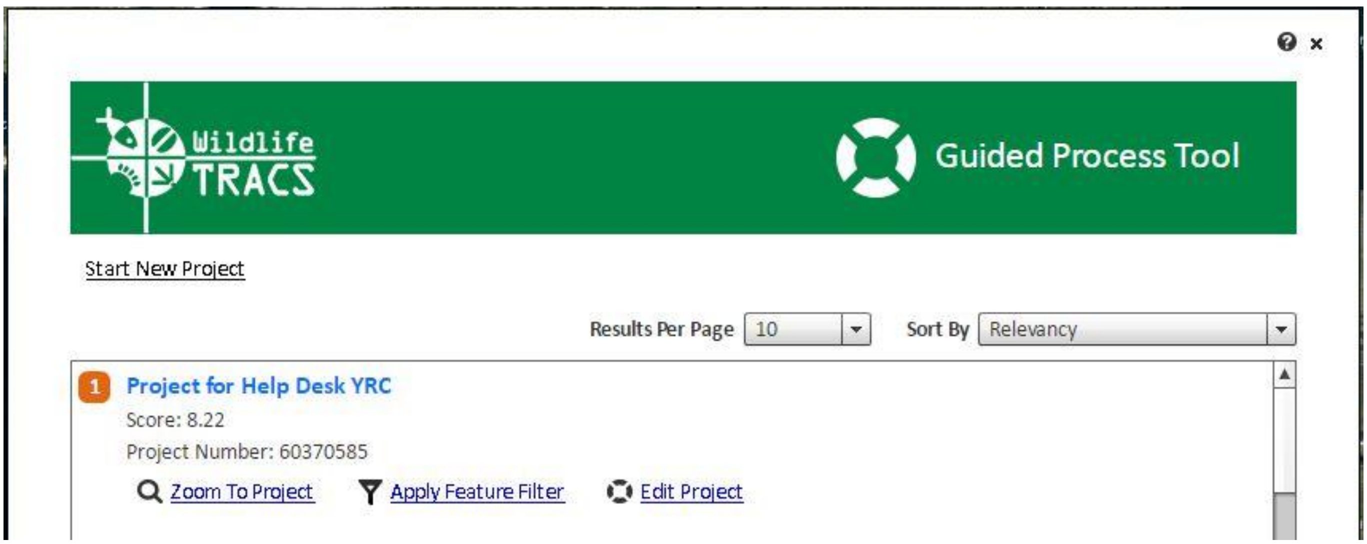

Wildlife TRACS
Guided Process Tool
Project: #1960282898 -- WA - Trout Hatchery Stocking and Operations - Multi Year Project FY 2014-2016 (WD123456)
Status: Active
Tasks
1. Enter Project Data
2. Enter Project Statements
3. Generate Project(s) Proposal
4. Associate Funding Source
5. Enter Action Data
6. Enter Estimated Cost
7. Submit Performance Report
Enter Action Data
Create New Action
Action: #1960283050 -- Unnamed
Start: 11/13/2014 End:
Zoom to Action Location
Edit Action Location
View/Edit Action Properties
View/Edit Interim Measures (0)
View/Upload Action Attachments (0)
View Action Summary Report
Delete Action

Copying the Project Shape as the Action Shape

IMPORTANT NOTE: The "copy shape as action" option is only available for custom shapes (drawn or imported by the user). It is not available for "shared shapes" such as a statewide boundary; instead use the Geopicker tool to create the action shape. Note: the action shape should match the project boundary or be within the project boundary.

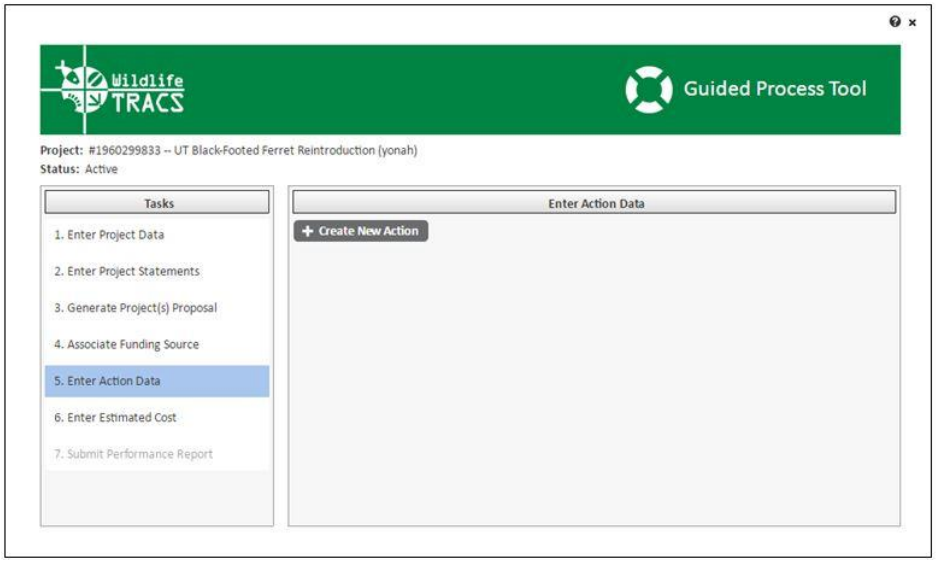
Tip: Make sure the project shape is accurate before copying it as the action shape. If any changes are made to the project shape after copying it as the action shape, those changes will need to be made to the action shape as well.

1. Prior to creating the action, search for the project using the Guided Process Tool and select **Zoom to Project** and **Apply Feature Filter** below the project name.

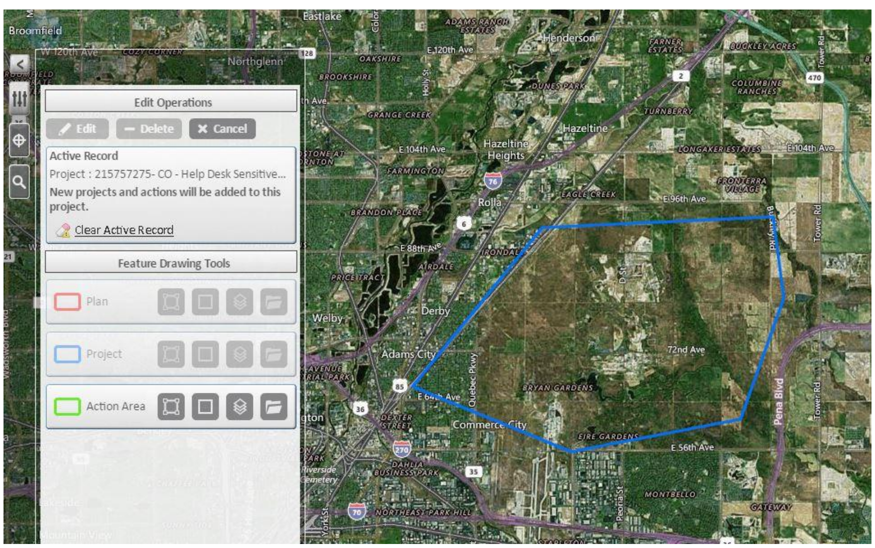


2. Click **Edit Project** to open the Guided Process Tool, then click **5. Enter Action Data** link in the **Tasks** panel of the Guided Process Tool.

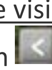
3. Click the **Create New Action** button located in the right panel.

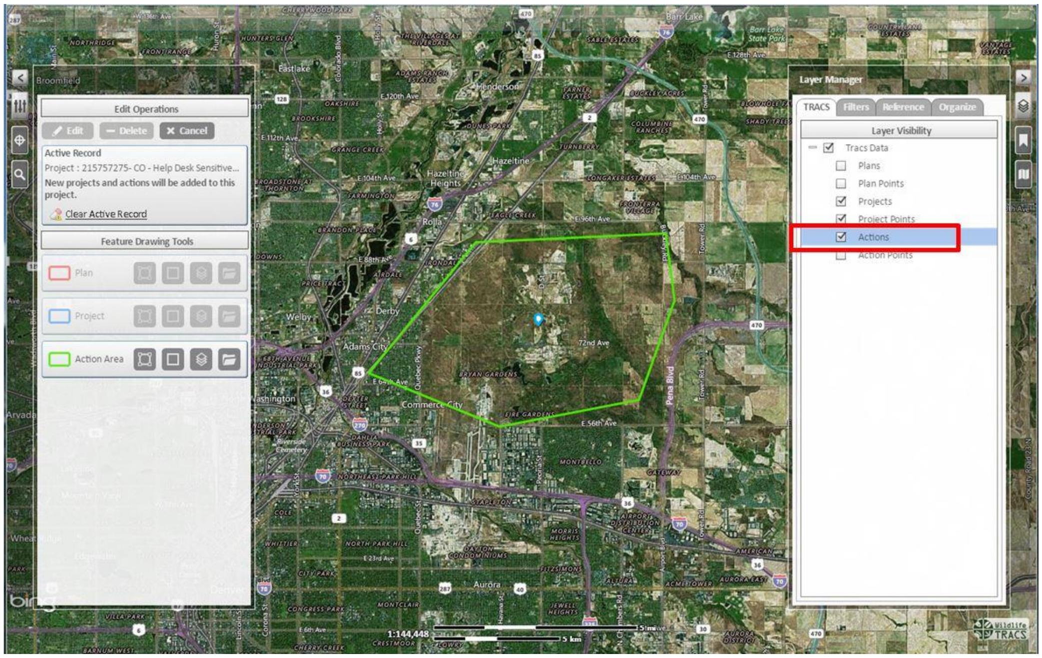


3. The Feature Editor window will open on the left and the project shape will display in blue on the right.



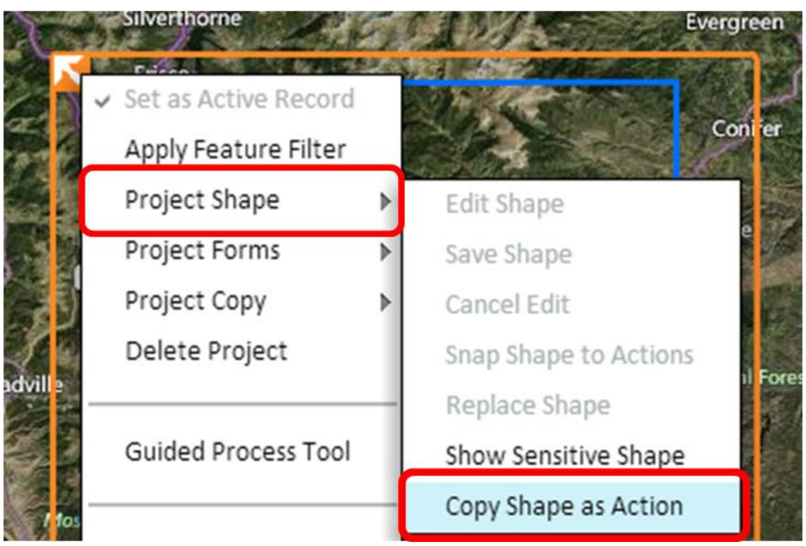
Note: If you have one or more actions already created for this project, the action shape(s) will display in green on the mapper and may hide the project shape below it.

<u>If you do not see the blue project shape (or the green action shape is the only shape visible)</u>: Open the **Layer Manager** dock on the right side of the screen by clicking on the arrow icon  (note the dock may already be open). Select the **TRACS** tab and click on the plus sign to expand the TRACS data menu. Then uncheck the box for "Actions".

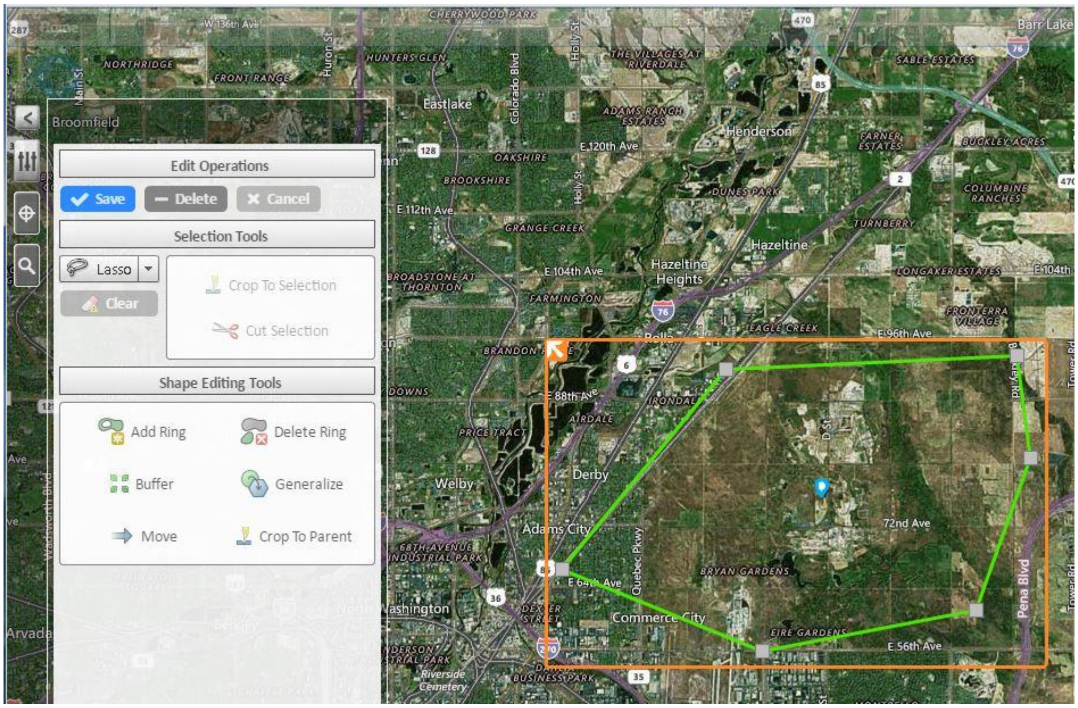


4. To copy the project shape as the action shape, click on or in the blue project boundary. The orange feature frame box will open. Click on the arrow in the upper left and select **Project Shape** and **Copy Shape as Action**. (Note: If the only option is "Guided Process Tool" then this is a shared shape and cannot be copied. Instead, use the drawing tools to create or select the shape.)

- **If the project was marked as sensitive, make sure to select **Show Sensitive Shape** BEFORE clicking **Copy Shape as Action** in order to copy the real shape not the buffered shape! This is especially important for validating acreage for land records.



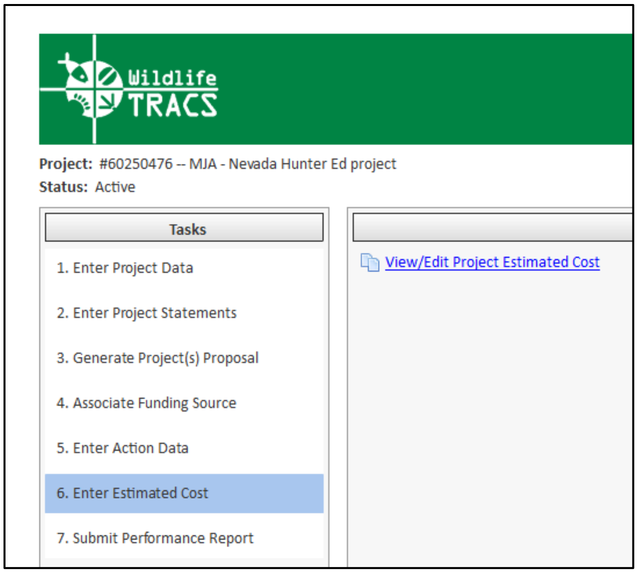
5. The green action shape will display. Click **Save** in the upper left. The Action Form will open. (Return to the previous chapter 8. Mapping and Entering Actions for additional steps to complete the action form).


Edit Operations
Save
Delete
Cancel
Selection Tools
Lasso
Clear
Crop To Selection
Cut Selection
Shape Editing Tools
Add Ring
Delete Ring
Buffer
Generalize
Move
Crop To Parent
Broomfield
Henderson
Hazeltine
Derby
Welby
Adams City
Commerce City
Pena Blvd
72nd Ave
E 56th Ave
E 104th Ave
E 120th Ave
E 112th Ave
E 88th Ave
Barr Lake
Eastlake
Arvada

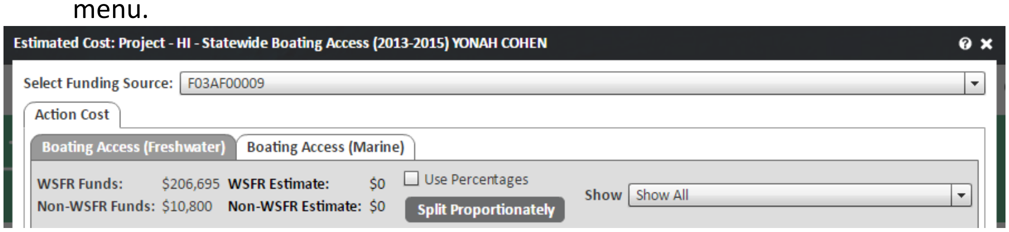
Lesson 9: Entering Estimated Costs

This chapter covers how to enter the estimated costs for the actions in your project. Estimated costs are required in TRACS for public reporting purposes only and not for auditing purposes.

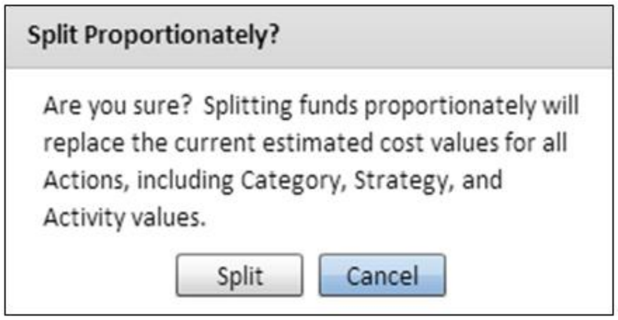
1. Click 6. Enter Estimated Cost link located in the Tasks panel of the Guided Process Tool. Click the Edit Project Estimated Cost link located in the right panel.



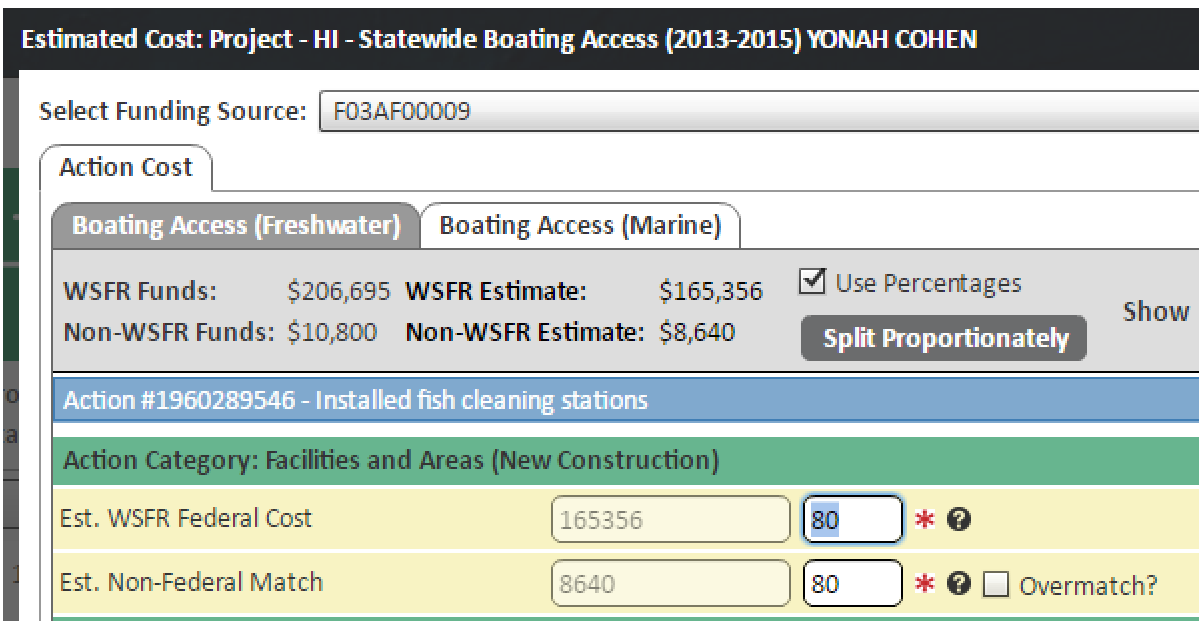
2. The estimated costs table appears. Estimates are entered here by action. It is important to keep in mind that these are <u>estimates only</u> and are NOT AUDITABLE. Auditable fiscal records are kept in FBMS.
   - If the project has more than one funding source, enter the estimates for each funding source by selecting them from the Funding Source drop down.
   - The grant program will appear as a tab in the Action Cost section. If there are multiple grant programs funding the project, they will appear as separate tabs that will need to be filled out.
   - The WSFR Funds and Non-WSFR Funds will appear in the top of the box.
   - Use the Show box (right side) to view all actions or select a specific action from the menu.



3. For each action (blue line), enter the estimated cost breakdown of **Est. WSFR Federal Cost** and **Est. Non Federal Match** applied to that action at the Category level.
    - Cost estimates breakdowns at the Strategy and Activity levels (sections in green) are optional but should be entered if available for more detailed reporting.
    - To apportion costs evenly between all actions and Category, Strategy and Activity levels, click the **Split Proportionately** button and click **Split.** (Note: There is no undo button, so incorrect amounts will need to be updated manually).



    - To use custom percentages, check the **Use Percentages** button. A small box will appear to right of the amounts to enter a percentage.



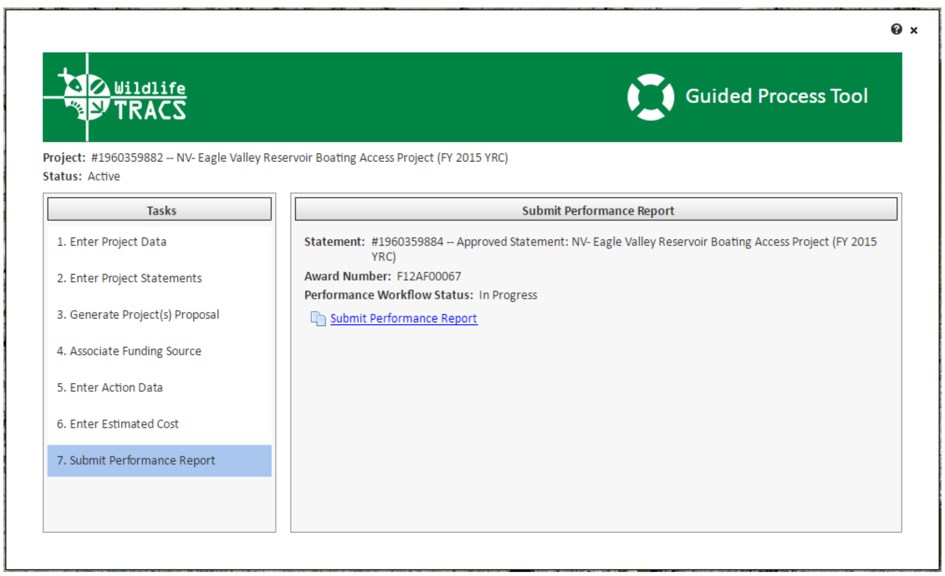
4. After entering the costs for all actions, click the **Save** button to save the Estimated Costs form.
5. Click the **Close** button.

Lesson 10: Submitting the Final Performance Report

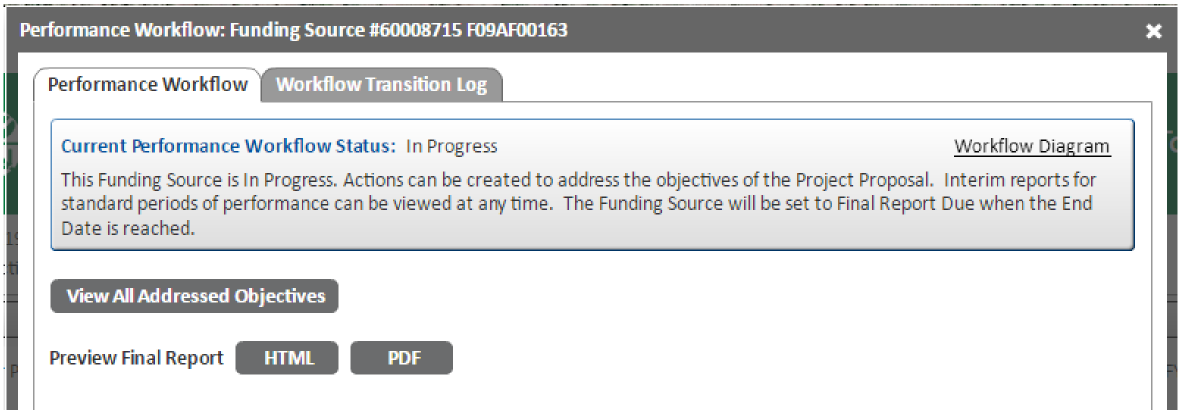
This chapter covers how to submit the final performance report and send it through the approval process. Performance reporting is required to comply with federal laws and regulations. It also allows you to share your project accomplishments with the public, government agencies and grant stakeholders.

Please note that this workflow only allows you to generate the **FINAL report**. If you need to generate an **Interim Report**, go to the Workflow Manager (for more information view [Chapter 20 Workflow Manager](#)).

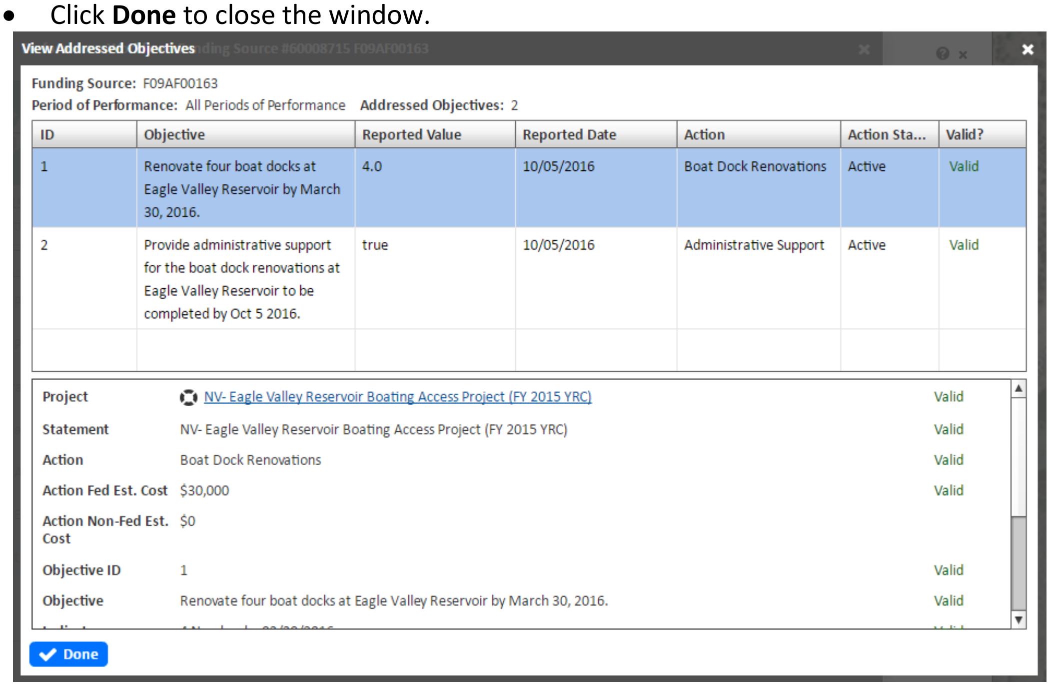
1. Open the **Guided Process Tool** for the project. On the left side, select **7: Submit Performance Report.** From the right panel, select **Submit Performance Report.**
    - **Tip:** To generate the final report, all actions should have a status of "Completed".



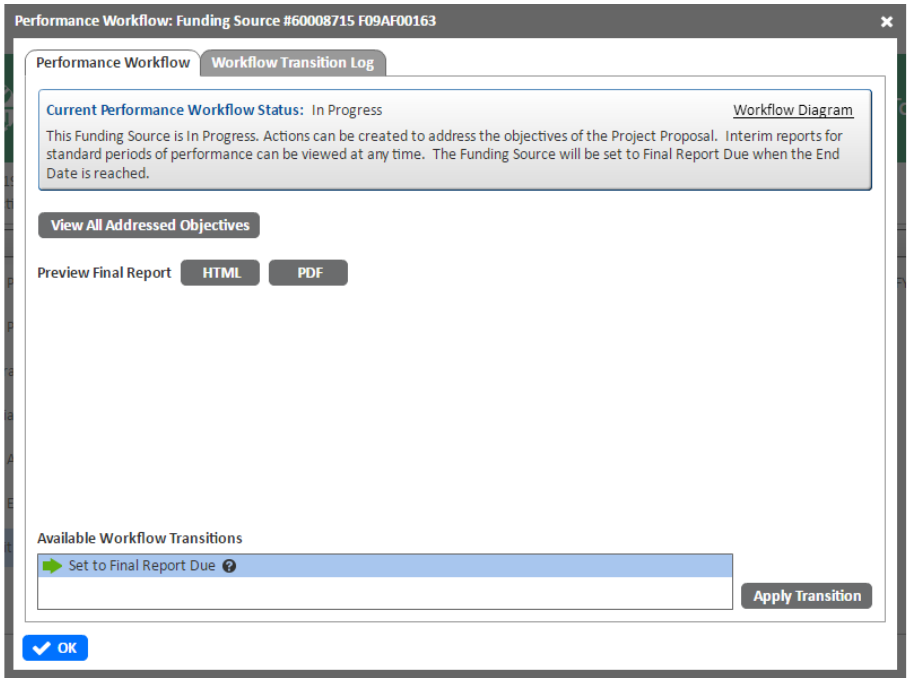
2. The current Performance Workflow Status box will display the current status starting as **In Progress**.
    - You can view a small version of the **Workflow Diagram** by clicking the **Workflow Diagram Link** located at the top right of the window.
    - Select the **HTML** or **PDF** buttons to view or download a preview of the final report.



3. Click the **View All Addressed Objectives** to view the addressed objectives. This is a good place to double check that everything is valid and ready for the final report.
    - Select an objective to view validation information in the lower half of the screen.
    - Errors will appear in red and will need to be fixed prior to proceeding. Warnings appear in yellow and do not have to be fixed prior to proceeding.
    - Click **Done** to close the window.

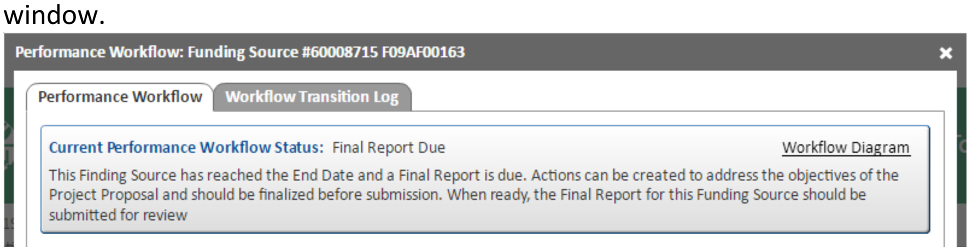


4. When the final report is due, select **Set Final Report Due** and then click **Apply Transition.** (Keep in mind that Interim Reports are not generated on this window. Go to the Workflow Manager to generate an interim report (see Chapter 20 for more information).



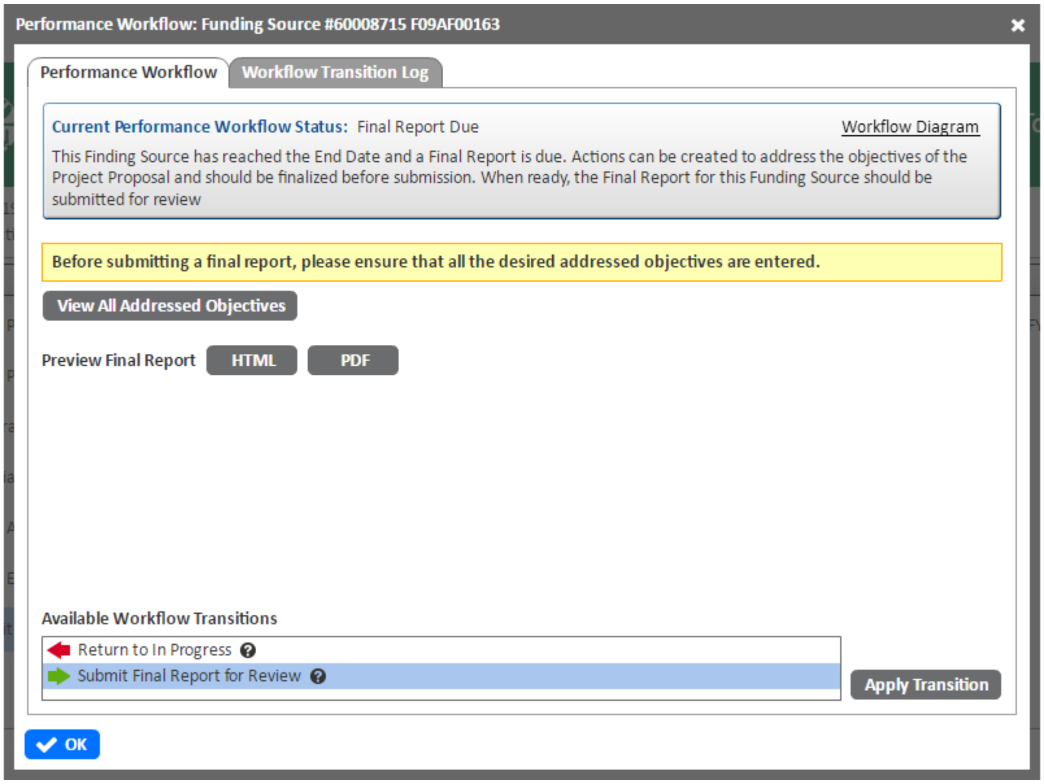
It is important to note that after you submit your final report for review and approval, you will not be able to change much of your core data, so be sure to double-check your work.

5. Once the report has been set to **Final Report Due**, the status will display at the top of the window.

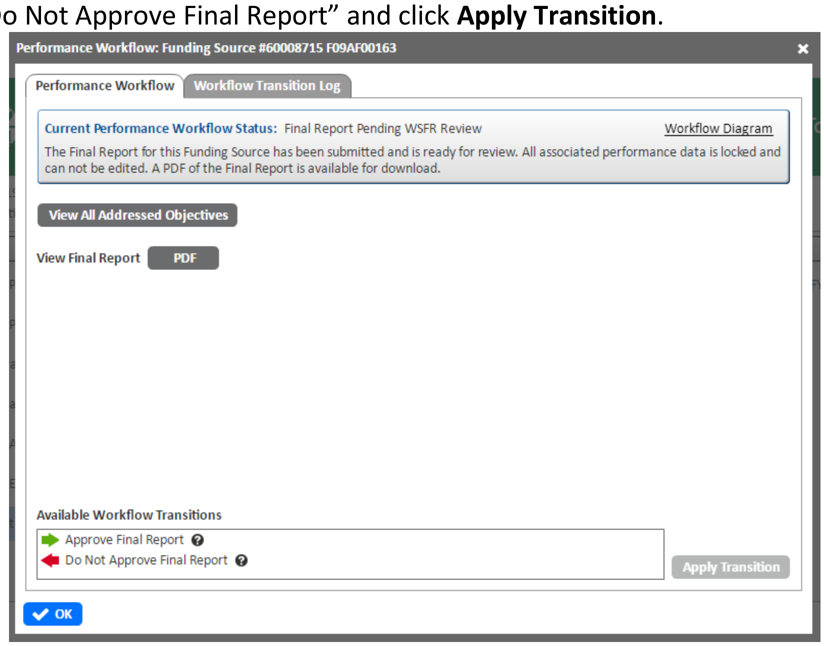


In the **Available Workflow Actions** box (lower half of the screen), you have the option to select **Return to In Progress** if the final report is not yet due. When the final report is ready for submission, select **Submit Final Report for Review** and click **Apply Transition.**

- Note: Any warnings (in yellow) or error messages (in red) will appear at the top of the screen. Warnings, such as the one displayed below, are informational and may not require any changes.

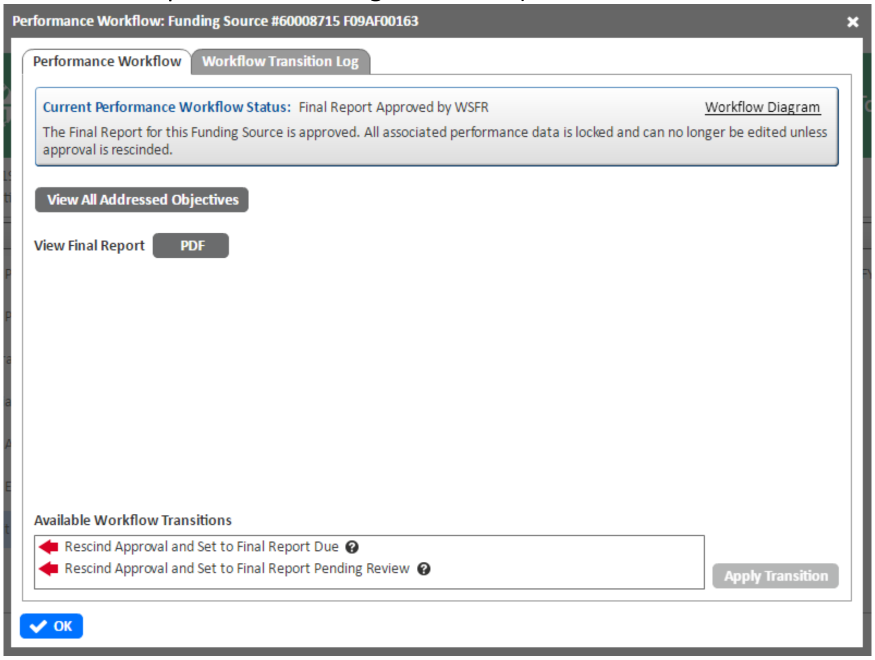


9. The status at the top of the window will display as "Final Report Pending Review". The federal reviewer is responsible for completing the review. He/she will then select "Approve Final Report" or "Do Not Approve Final Report" and click **Apply Transition**.



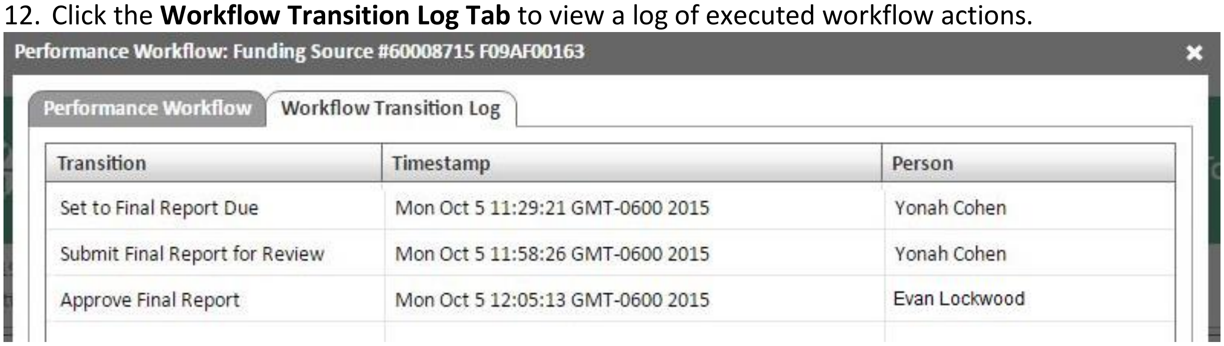
Note: The system does not currently send automatic notifications, so you will need to follow-up with the reviewer to let them know when the final report is pending their review. Likewise, the federal reviewer should contact the editor to let them know if the final report is approved or not and if any revisions are needed.

10. Once the final report has been approved, it will display with the status “Final Report Approved” at the top of the window. The final report can be viewed or downloaded by selecting the PDF button. (Note: The HTML preview is no longer available).



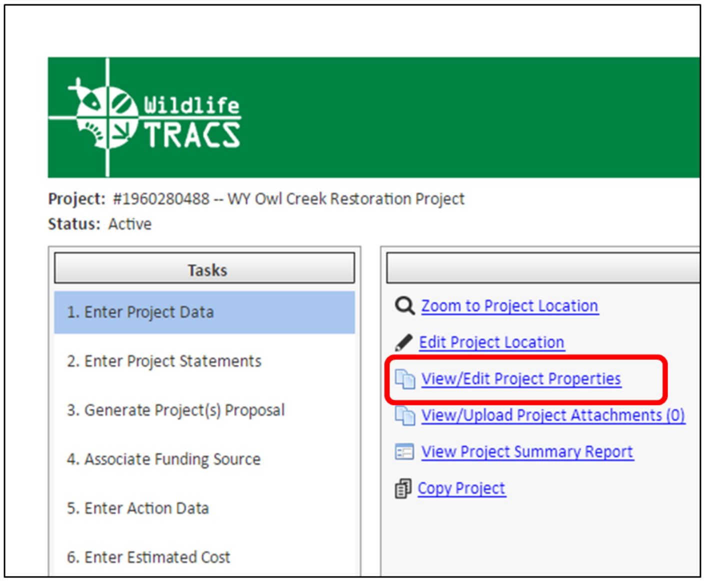
11. If the data needs to be edited after the final report has been approved, contact the federal reviewer to rescind approval. The federal reviewer can select “**Rescind Approval and Set to Final Report Due**” (and click **Apply Transition**) which allows the state editor to make any changes and submit the project for approval again. The other option is to select “**Rescind Approval and Set to Final Report Pending Review**” which allows the federal reviewer to make changes.

12. Click the **Workflow Transition Log Tab** to view a log of executed workflow actions.

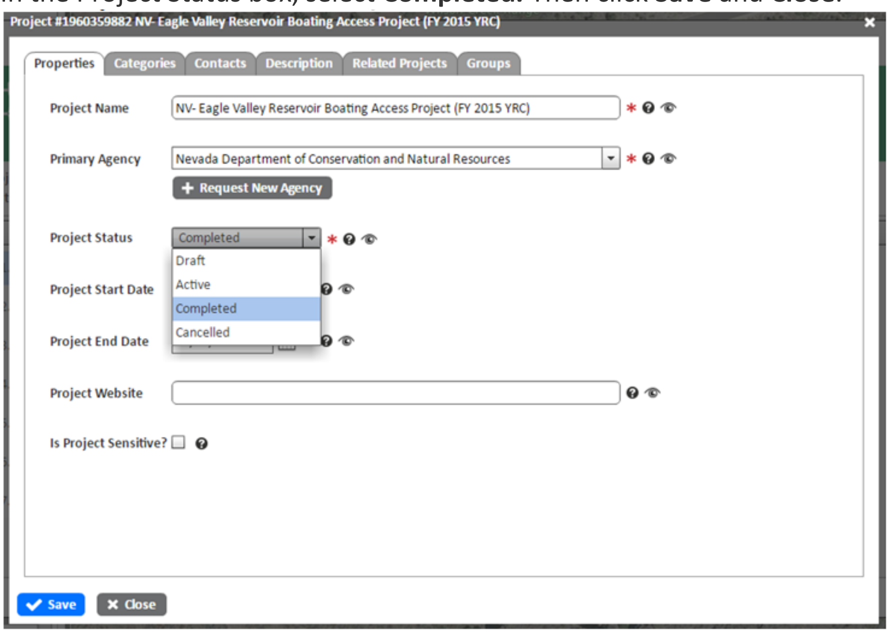


13. Click the **OK** button to close the **Workflow** form. Note: The status of the workflow displayed on the Guided Process Tool will not update until you close and re-open the window.

14. Once the status is **Final Report Approved**, the user who created the project will need to go back into the Guided Process Tool to mark the project as “complete**”**. From the Guided Process Tool, select **1 Project Data** on the left side. Then select **View/Edit Project Properties** on the right side.



6. In the Project Status box, select **Completed.** Then click **Save** and **Close**.



Lesson 11a: Advanced Mapper Tools

This chapter will cover some additional mapper tools and navigation tips that are not covered in the TRACS Basic Course (chapters 1-10). This includes all of the methods to navigate the mapper toolbar, navigation toolbar and the feature editor.

Navigation Toolbar

While most people use the mouse and scroll wheel to navigate the mapper, the navigation toolbar offers some additional alternatives that may be helpful when you are working on a computer without a mouse or scroll wheel, such as a laptop in the field.

The **Navigation Toolbar** is translucent and appears when you hover over it. It is located in the upper left hand corner of the mapper.

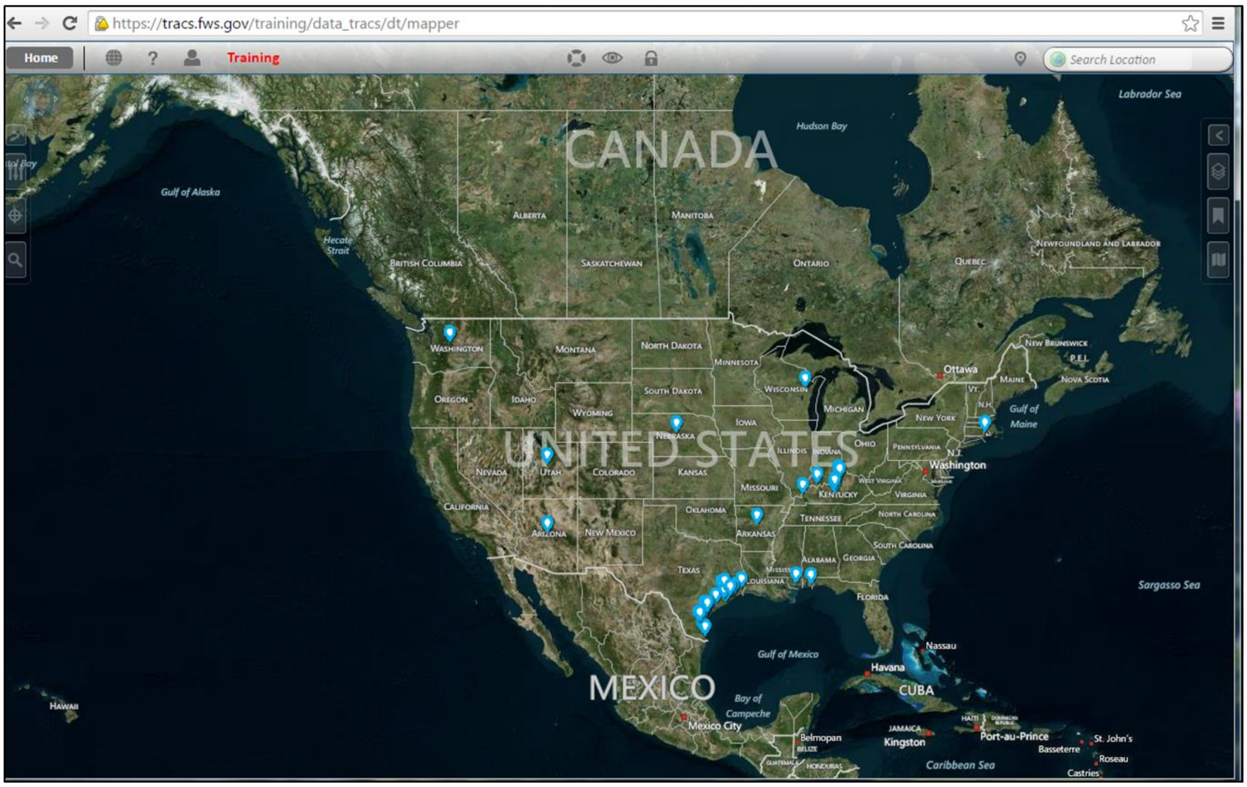
Click on the **blue arrow wheel** to move the map (click on an arrow to move the map in that direction or click between the arrows to move diagonally). Move the **sliding scale** (on the left) up and down to zoom the map in and out.

The buttons on the right are listed below with a brief description:

- **Pan mode (hand icon)** allows end-users the ability to grab and move the map in any direction by left clicking on the map.
- **Zoom In (magnifying glass with plus sign)** allows end-users to zoom in on a particular map area by drawing a box.
- **Zoom Out (magnifying glass with minus sign)** allows end-users to zoom out on the map by drawing a box.
- **Show Map Scale (1:X icon)** allows end-users to toggle the map scale located at the center bottom of the basemap.
- **Show Mouse Coordinates (arrow icon)** displays the latitude/longitude at the end-user's mouse cursor location.
- **Show Overview Map (map icon)** allows end-users to view a world street map superimposed on the current basemap. This is useful for determining street location when viewing satellite imagery.

Mapper Toolbar

The **TRACS Mapper** allows end-users to view and manage project data in a geographic context. The data created in the **Mapper** identifies the specific geographic location of **Plans**, **Projects**, and **Actions**. By default, blue project points appear first on the mapper and boundaries appear at a closer zoom scale.

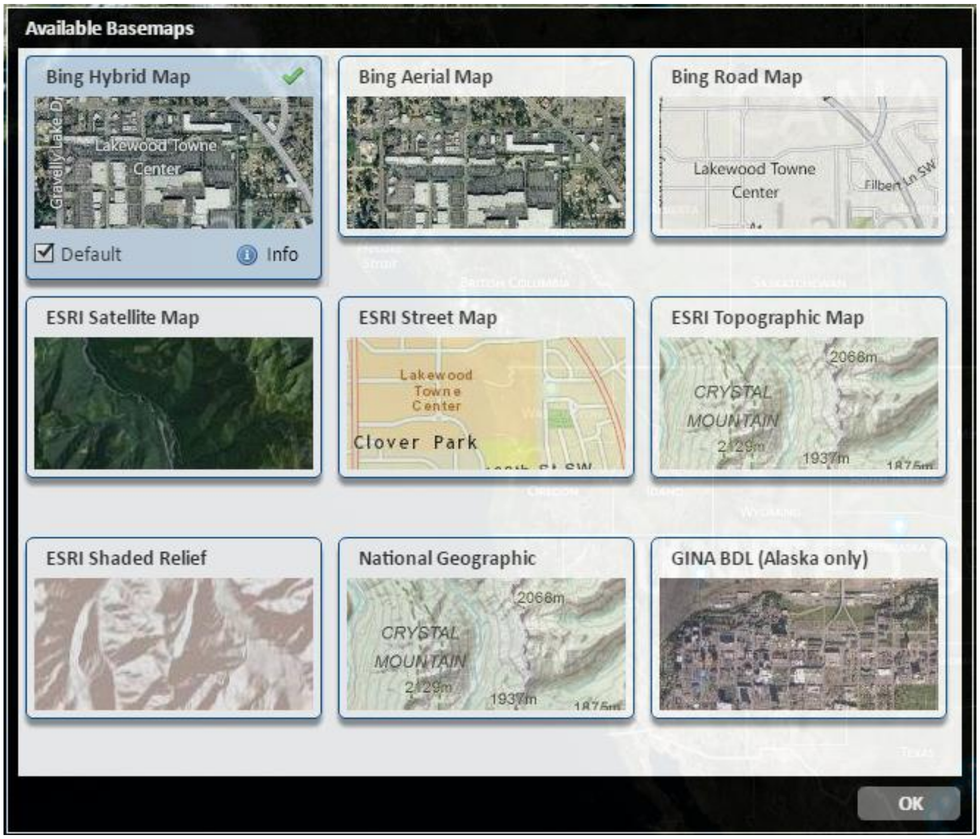


The toolbar located in the top middle of the **Mapper** is referred to as the **Mapper Toolbar**. The toolbar is dimmed by default until the mouse cursor hovers over it.

The components of the **Mapper Toolbar** are listed below with a brief description.

The home button returns end-users to the **TRACS Dashboard**.

 The globe icon displays a list of **Available Basemaps** in TRACS. The **Bing Hybrid** map is visible by default. Basemaps are used to display specific location by features and characteristics. For example, a road basemap reflects the features (small-scale) and characteristics of roads for a specific location. A topographic basemap reflects the features (large-scale) and characteristics present at a specific geographic location (e.g. elevation).

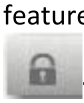


 **Help Desk**. End-users can submit a help desk request to the TRACS support team.

 **Logs out** of TRACS and end the current session

 **Guided Process Tool** guides an end-user through the data entry workflow.

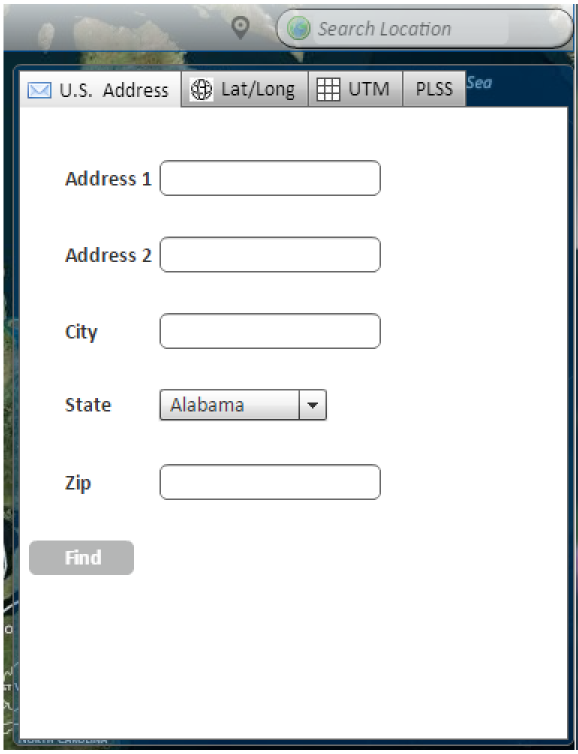
 **Identify Visible Map Features** allows end-users to view summary information for map features that are visible on the map.

**Toggle Map Navigation** allows end-users to lock the basemap so it does not move when using the cursor to draw a feature.

 **Reverse Geocode** allows end-users to obtain geographic coordinates and street address for a specific location.

Search Location allows end-users to search for specific geospatial location by street, address, latitude / longitude, survey data, street address, county, state, etc.

- Clicking on the **globe icon** (within the search bar) allows users to enter more detailed search criteria by U.S. Address, Latitude/Longitude, UTM or PLSS.



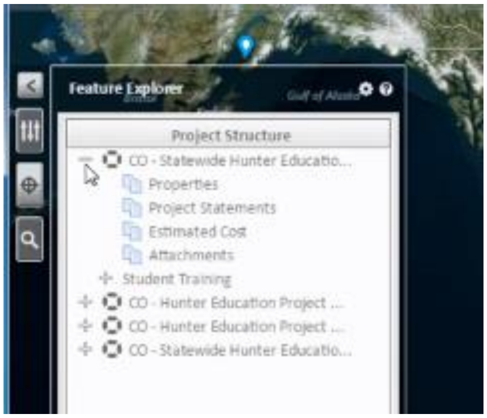
Feature Editor (left side dock)

The components of the **Feature Editor Dock** are listed below with a brief description:

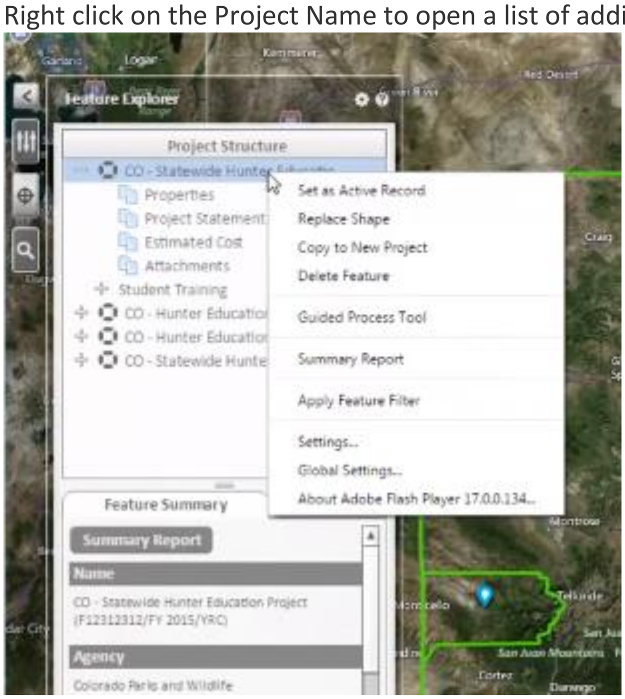
- **Restore Dock** opens and minimizes the **Feature Editor** and **Feature Explorer** tools.
- **Feature Editor** allows end-users to create and edit **Plans, Projects**, and **Actions**.
- **Feature Explorer** allows end-users to navigate, browse, and edit data including **Plans, Projects**, and **Actions**.
- **Feature Search** allows end-users to search for existing **Plans, Project, or Actions**. Searches can be performed using the feature name or ID number.

Tips:

- Click on a plan, project or action on the map to open the Feature Explorer window on the left with a list of project(s) associated with that polygon. If a shared shape (such as the statewide boundary) was selected, all projects with that shape will display.
    - Click on the plus sign to open an individual form or click on the Guided Process Tool icon to open the entire project.



    - Right click on the Project Name to open a list of additional tools.



Lesson 11b: Using Layers and Filters

This chapter will cover the **layer manager** and **filters** which can be used to customize your view in the mapper. The term ***layer*** refers to the information that can be overlayed onto the map (such as blue project points); whereas ***filters*** allow you to specify what project data you want to see on the map (such as the projects in your group).

These tools can be accessed by opening the Layer Manager (right side dock).

The components of the **Layer Manager toolbar** are listed below with a brief description:

- **Restore Dock** opens or closes the dock.
- **Layer Manager** allows end-users to control filters and the visibility of reference layers (e.g. external datasets and TRACS features) on the **Mapper**.
- **Bookmarks** allow end-users to bookmark geographic locations for quick reference in the future (e.g. project location, region, state, county). **Bookmarks** are specific to an individual user account.
- **Map Legend** allows end-users to view symbology and labels for reference layers and TRACS features. Specific colors and shapes are used to identify items of interest (e.g. habitat types).

Please go the next subchapter for more information.

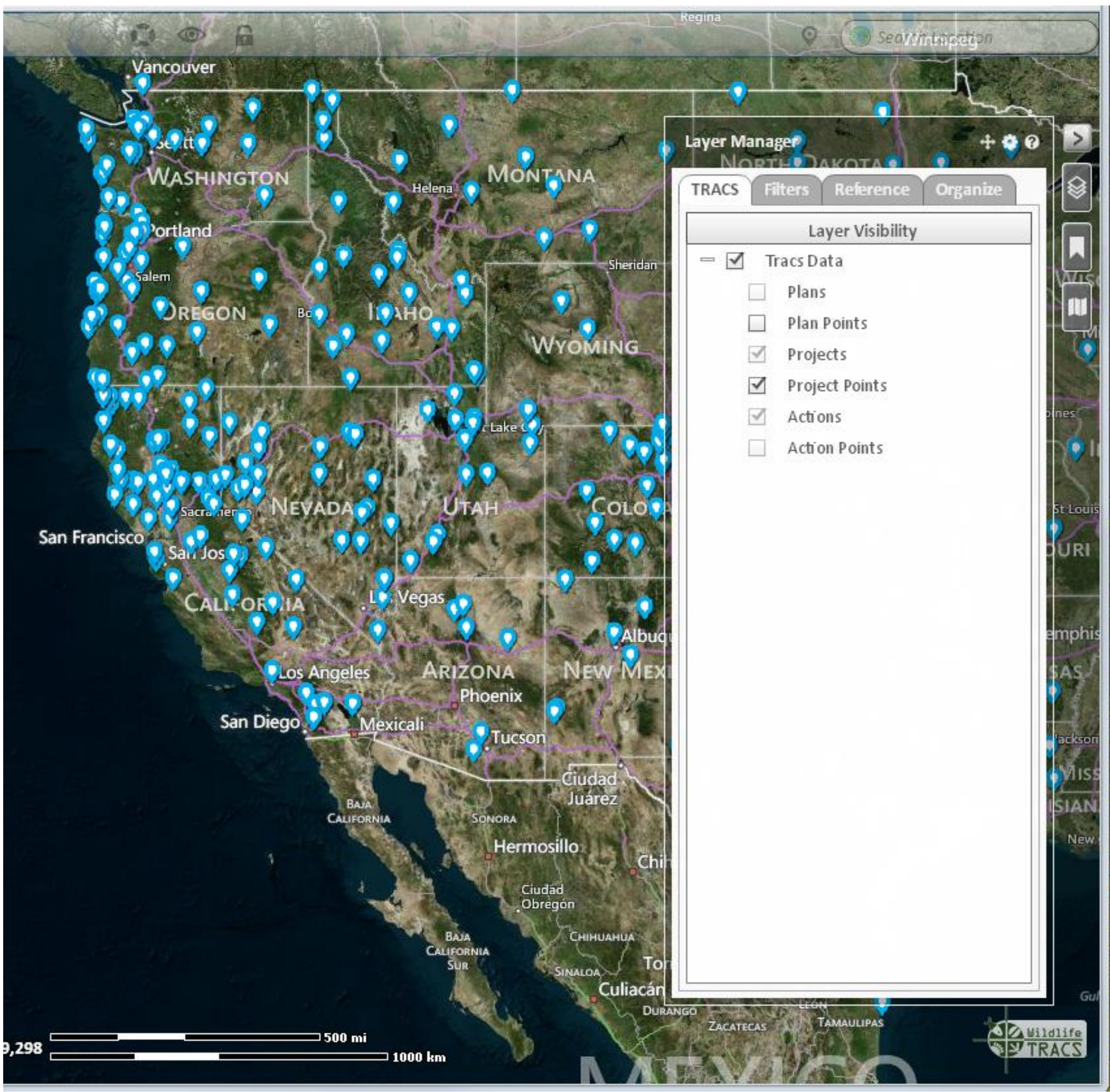
- Adding Map Layers
- Managing Filters
- Managing Bookmarks

Adding Map Layers

TRACS Layers

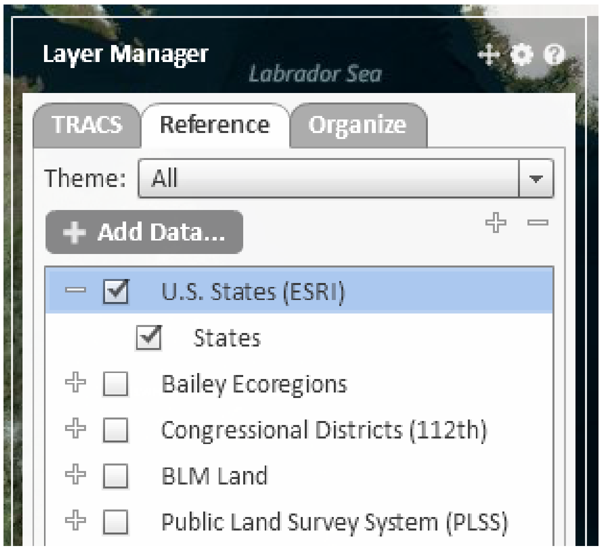
The first tab in the Layer Manager dock (right side) is the TRACS tab. TRACS Data is the default source layer.

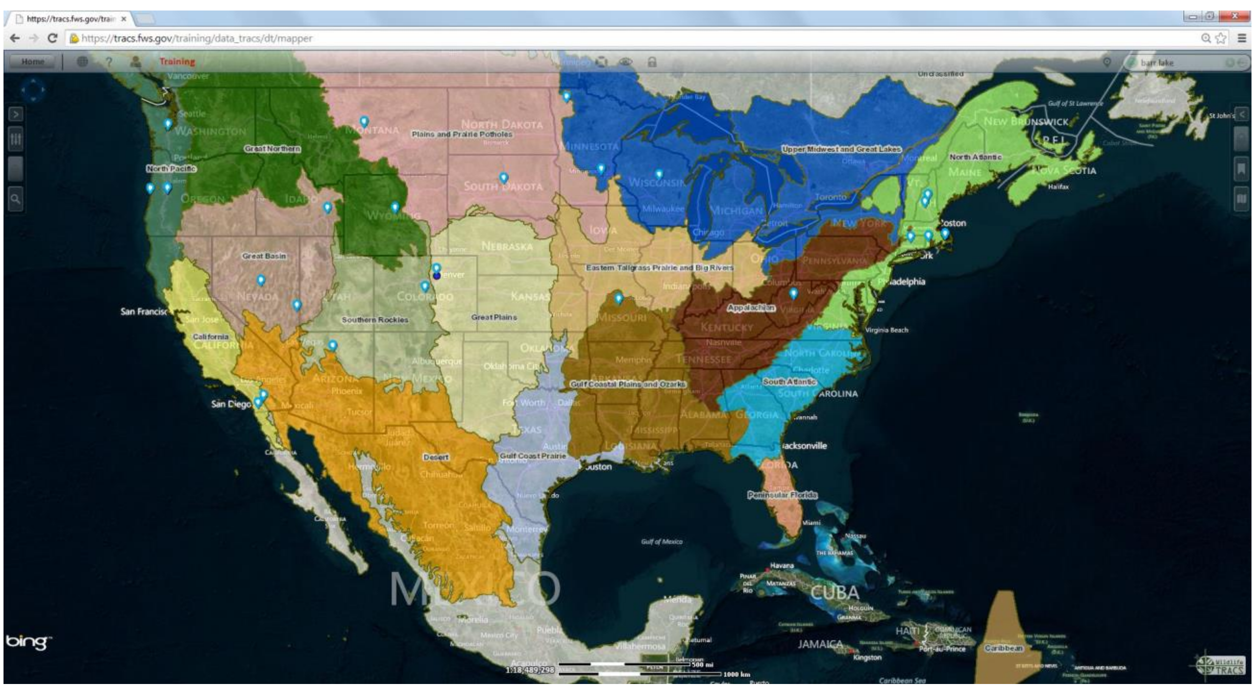
Click on the next to TRACS Data to expand the section. Check or uncheck (toggle click) the boxes to view Plans, Plan Points, Projects, Project Points, Actions and/or Action Points. If a box appears in grey, it is not visible at the current scale.



Reference Layers

Reference layers can assist with creating features like Plans, Projects, and Actions. Click the **Reference** tab. Click the (+) sign using the left button on your mouse to expand available layers. For example, to view state boundaries, check the box by U.S. States and click the + sign to select States.



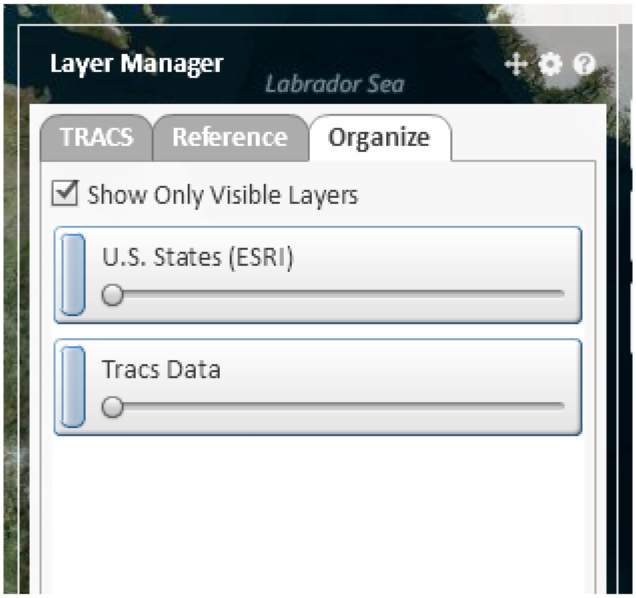


Reference Layers List	
U.S. States	State boundaries from ESRI (Environmental System Research Institute)

(ESRI)	
Bailey Ecoregions	Ecoregions are ecosystems of regional extent. Bailey's ecoregions distinguish areas that share common climatic and vegetation characteristics. http://nationalatlas.gov/mld/ecoregp.html
Congressional Districts (112th)	Displays congressional districts for the 112th United States Congress, symbolized by the political party of the district's representative (Democrat blue, Republican red).
BLM Land	Displays Bureau of Land Management areas including National Conservation Areas, National Monuments, Wilderness Areas, Lands, Lands Dissolved and Bankhead Jones (farm tenant purchase program).
Public Land Survey System (PLSS)	The Public Land Survey System (PLSS) is a way of subdividing and describing land in the United States. All lands in the public domain are subject to subdivision by this rectangular system of surveys, which is regulated by the U.S. Department of the Interior, Bureau of Land Management (BLM). It encompasses major portions of the land area of 30 southern and western States. The PLSS typically divides land into 6-mile-square townships, which is the level of information included in the National Atlas. Townships are subdivided into 36 one-mile-square sections. Sections can be further subdivided into quarter sections, quarter-quarter sections, or irregular government lots. http://www.nationalatlas.gov/articles/boundaries/a_plss.html
FWS Cadastral Dataset	Datasets that depict USFWS approved acquisition boundaries and managed lands. National Wildlife Refuges (>3M), Wetland Management Districts, Naitonal Wildlife Refuges (<3M), Waterfowl Production Areas.
FWS Joint Ventures	Displays boundaries and names for FWS Joint Ventures (i.e. partnerships of agencies, organizations, corporations, tribes, or individuals that conserve habitat for priority bird species, other wildlife, and people). http://www.fws.gov/birdhabitat/JointVentures/index.shtm
FWS Landscape Conservation Co-op (LCC)	LCCs are areas that designate applied conservation science partnerships with States, Tribes, Federal agencies, non-governmental organizations, universities and other groups. http://www.fws.gov/landscape-conservation/lcc.html
FWS Regions	Displays the boundaries for the 8 regions and D.C. headquarters for the U.S. Fish and Wildlife Service.
FWS Refuges	Displays FWS Wildlife Refuge locations, labels and boundaries.
National Hydrography Dataset	The National Hydrography Dataset (NHD) and Watershed Boundary Dataset (WBD) are used to portray surface water on The National Map. The NHD represents the drainage network with features such as rivers, streams, canals, lakes, ponds, coastline, dams, and streamgages. The WBD represents drainage basins as enclosed areas in eight different size categories by HU (Hydrologic Unit). http://nhd.usgs.gov
NatureServe Endangered Species	Displays Endangered Species counts by status, county, and/or watershed. NatureServe represents a network of independent centers that collect and analyze data about the plants, animals, and ecological communities of the Western Hemisphere. http://explorer.natureserve.org/statusus.htm
Nature Serve Habitat Types	Displays Habitat Types defined by NatureServe.
Soil Survey (SSURGO)	The SSURGO database contains information about soil as collected by the National Cooperative Soil Survey over the course of a century. http://www.nrcs.usda.gov/wps/portal/nrcs/detail/soils/survey/?cid=nrcs142p2_0536277
Alaska (GINA)	Geographic Information Network of Alaska (GINA) Best Data Layer (BDL) developed by the University of Alaska. The GINA layers include rivers, wetlands, hydrologic units, statewide parcels and Kenai parcels. http://www.gina.alaska.edu
TRACS Data	The default layer displays projects, project points and actions, but can also include plans, plan points and action points.

Organize Layers

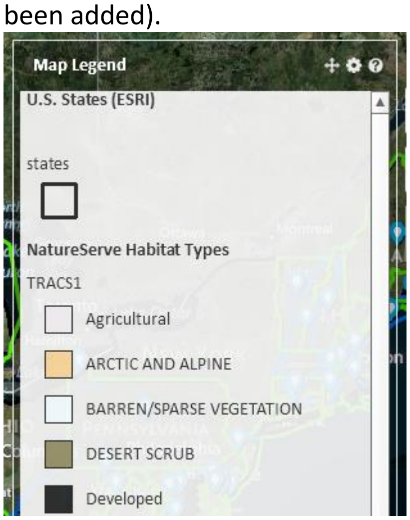
Click the **Organize Tab** to arrange layer order (drag and drop to rearrange) and modify layer transparency with the sliding bar. Layers on the map are less opaque as the transparency increases. Slide right for more translucent or left for more opaque/visible. Repeat the process to display additional reference layers.



Map Legend

Click the **Map Legend** button from the **Right Toolbar.**

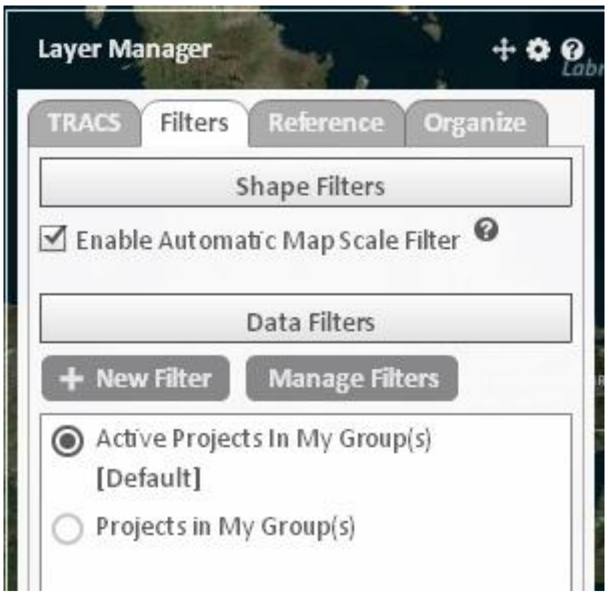
Use the **Legend Tool** to determine what the shaded colors represent (will only display if layers have been added).



Managing Filters

The second tab in the Layer Manager dock (right side) is the Filters tab. This tab allows users to manage and create new filters.

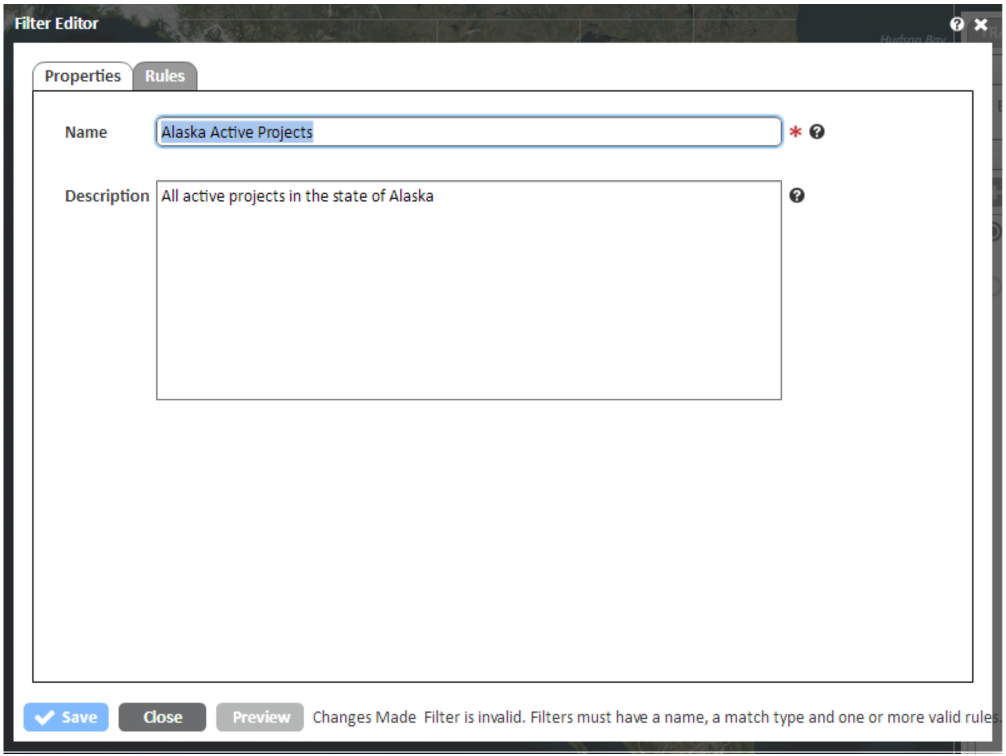
- The **Enable Automatic Scale Filter** (checked by default) is used to hide shapes that are either too small or too large to fit inside the current map window.
- The system filters include **Active Projects in My Group(s)** (the system default filter) and **Projects in My Group(s)**.
- The **New Filter** button allows users to create a new filter.
- The **Manage Filters** button allows users to manage filters, including selecting active and default filters.



Create a New Filter

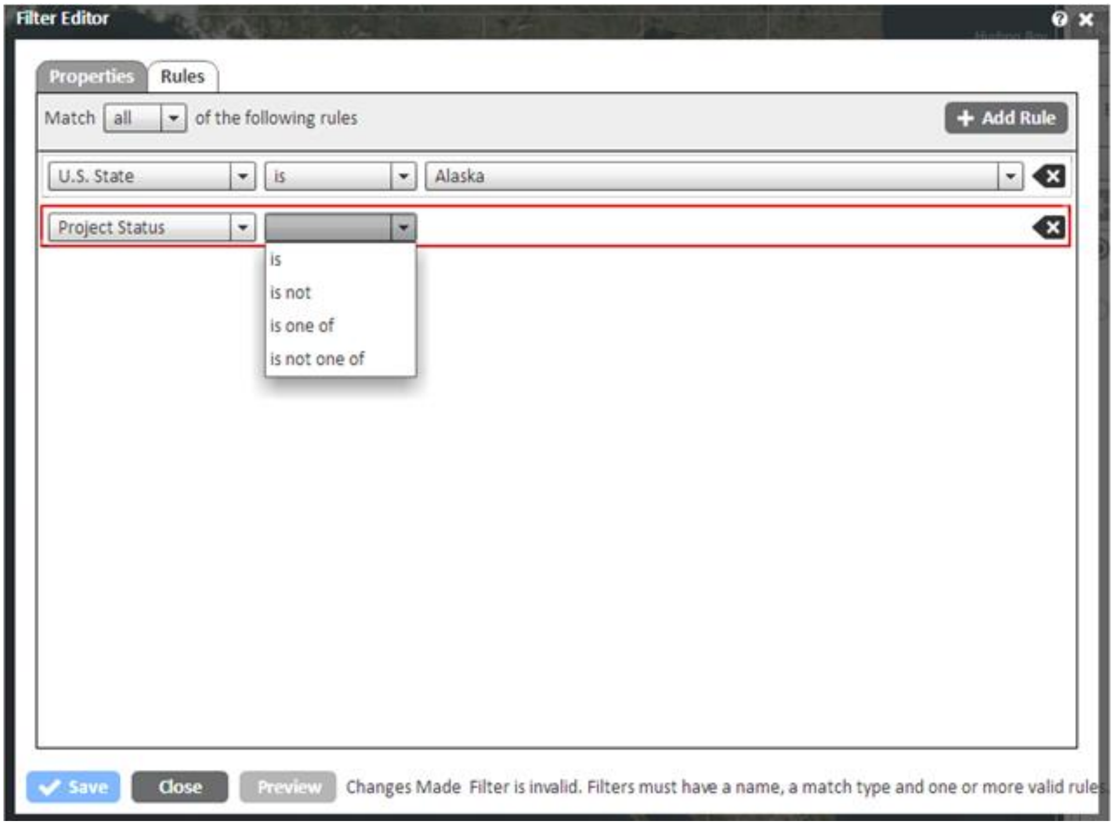
1. Select the New Filter button  to open the Filter Editor window.

2. On the Properties tab, enter a name for the filter. A description is optional.

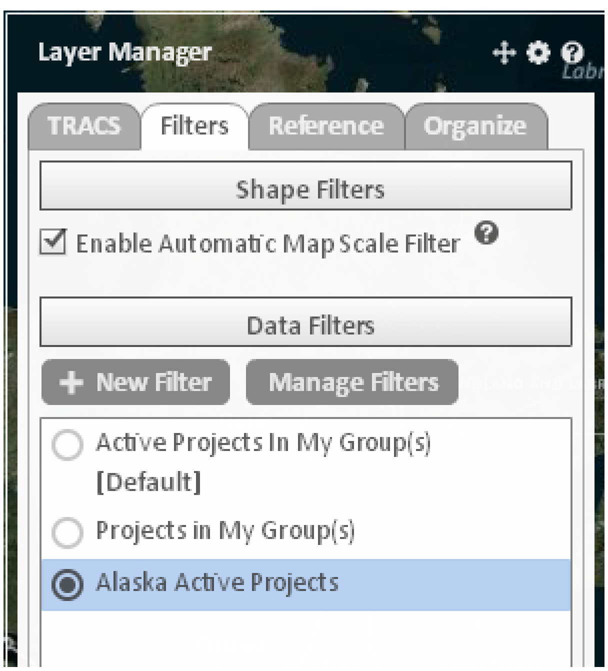


3. Select the **Rules** tab. In the Match box, select the rule to match **all** or **any**. Click **Add Rule**.

4. Select the filter category from the first box, the rule from the second box and the filter value from the third box. Click **Add Rule** to add another rule or click  to remove the rule. Then click **Save** and **Close.**



The new filter will be displayed on the main Filters tab. Select the filter to view (only one filter can be active at a time).

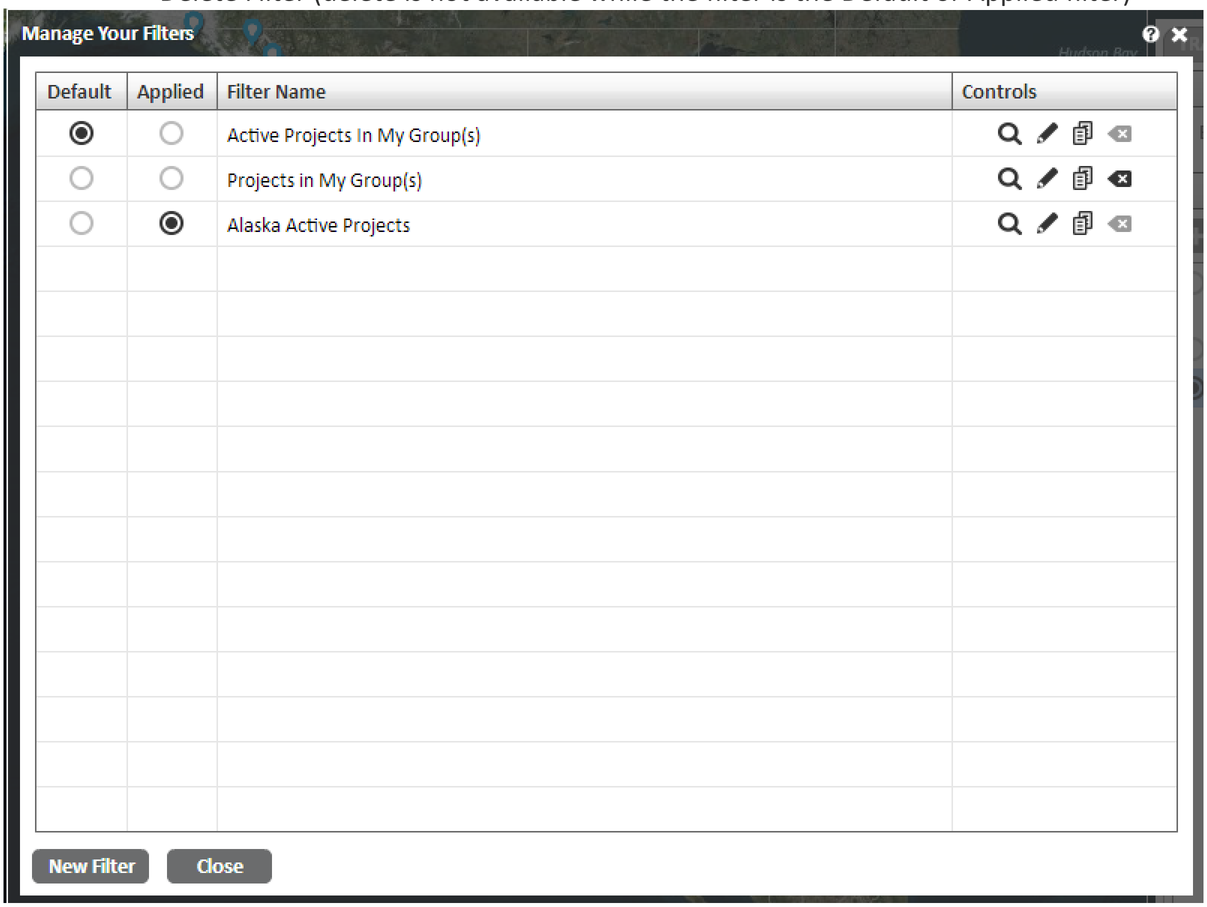


Manage Filters

The Manage Filters button opens the window. Select the **Default** button to make a filter the default.

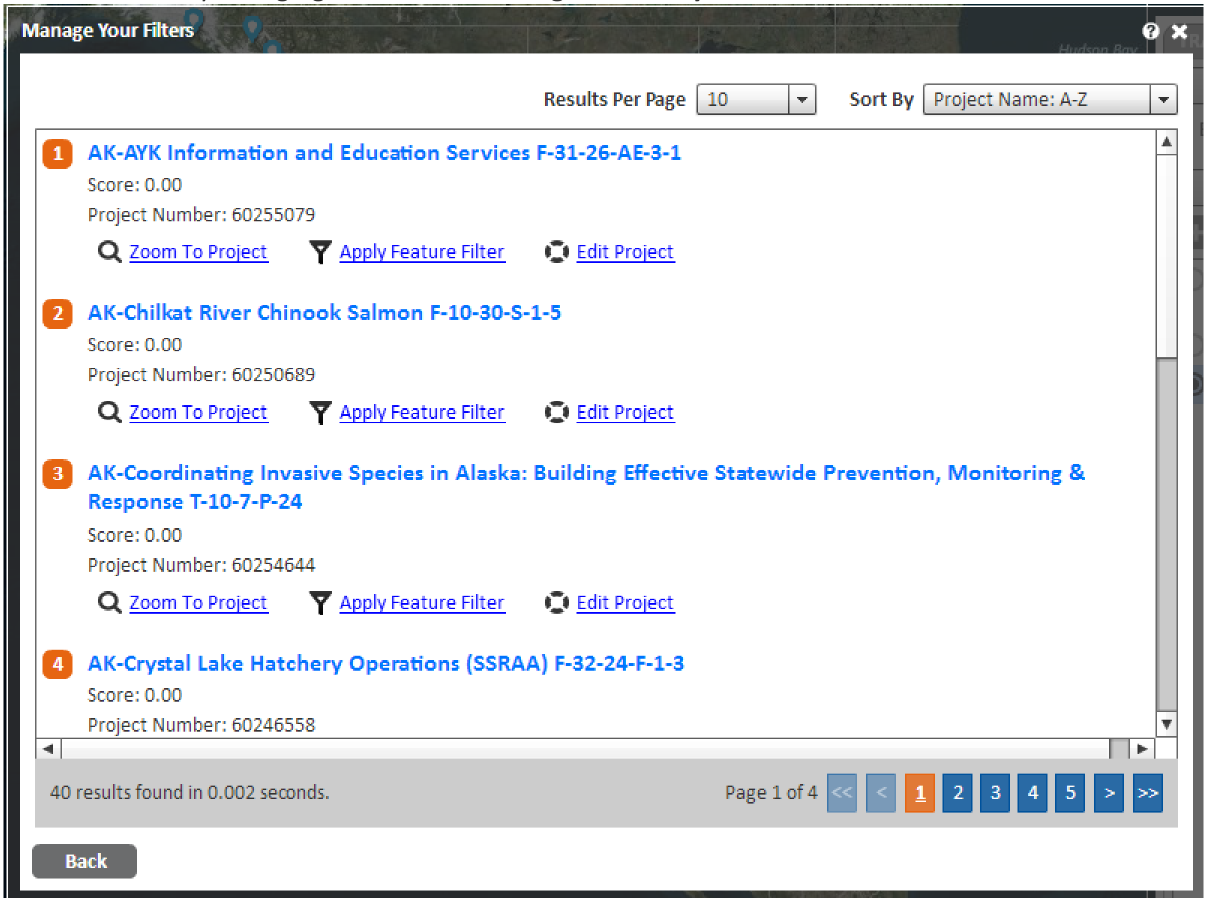
Select the **Applied** button to apply that filter (only one filter can be applied at a time).
The Controls (right side) include:

- Preview Filter
- Edit Filter
- Copy Filter
- Delete Filter (delete is not available while the filter is the Default or Applied filter)



Preview Filter

The Preview button  allows the user to view a list of projects that meet the filter rules. The view can be customized by changing the **Results Per Page** or **Sort By**.

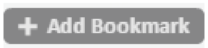


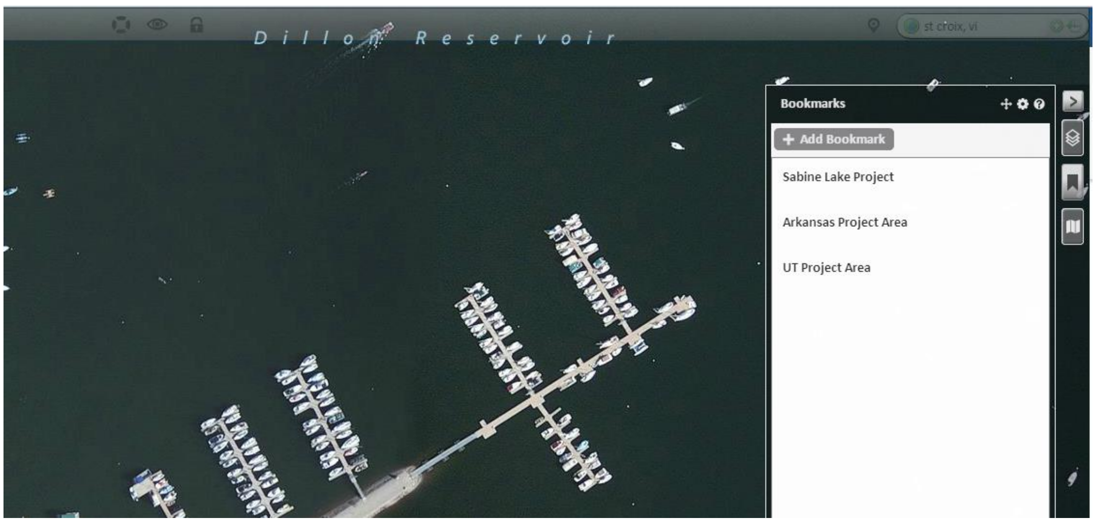
Below each project are links to **Zoom to Project** (zooms the map to the project), **Apply Feature Filter** (creates a filter to view only that project) and **Edit Project** (opens the Guided Process Tool). Legacy Projects will only have the **Edit Project** Link.

Bookmarks

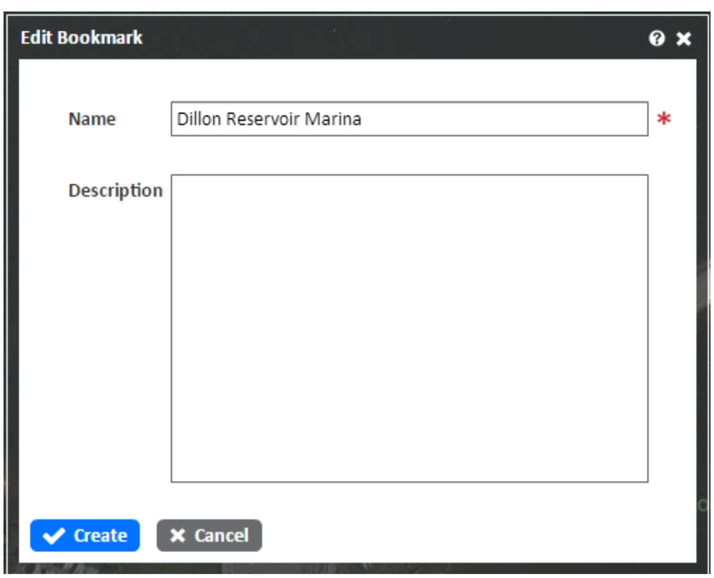
Bookmarks are used to save a geographic location for quick reference in the future (e.g. project location, region, state, county, etc.). Bookmarks are specific to an individual user account.

From the Layer Manager dock, select the Bookmark tab  on the right side bar.

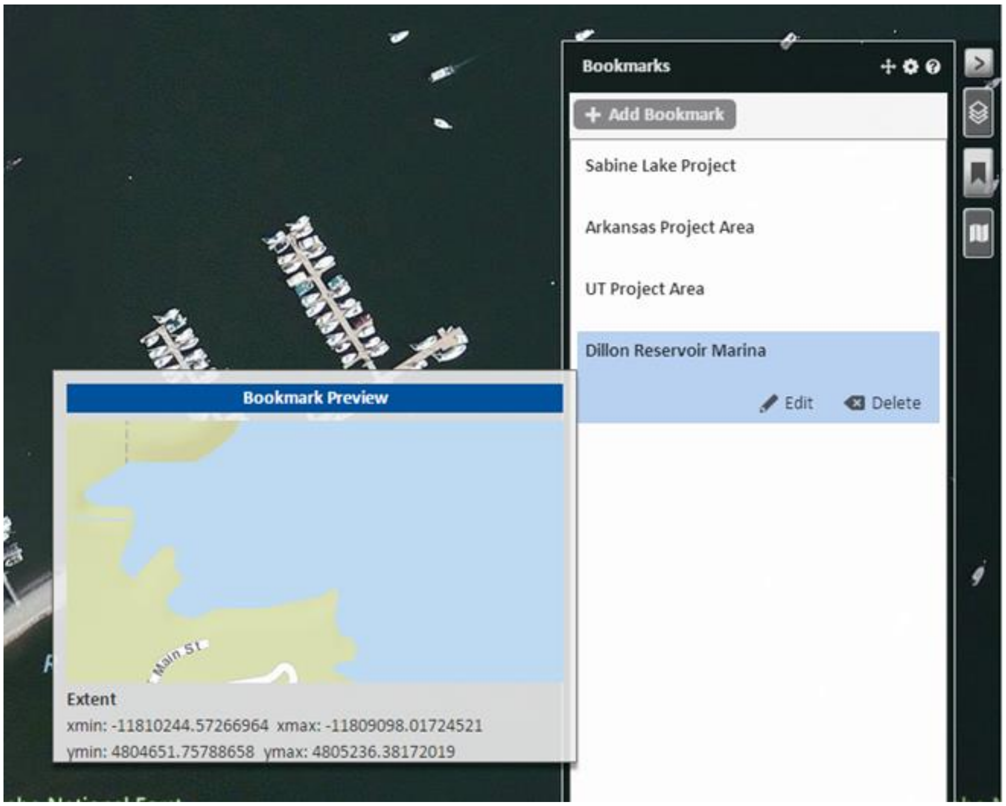
To create a new bookmark, navigate or zoom to the location you would like to bookmark on the map and click 



Enter a name for the bookmark (description optional). Click **Create**.



The saved bookmark will display in the list. Hover over a bookmark to view a Bookmark Preview. Click on the bookmark to zoom to that location and view the Edit and Delete buttons.



Lesson 12: Advanced Shape Editing

This chapter covers some of the advanced shape editing tools that are available in TRACS. In chapter 2, we reviewed the basics of creating a shape. As a quick review, the term "shape" refers to the geospatial information that defines the boundary of a project, plan or action. That shape may indicate an area where fish or wildlife are located, a specific piece of property where construction is planned or a political boundary where a project is located, such as a city, county, or state.

In the next section, you'll find Shape Creation and Editing information including:

- Create a Shape
- Open Shape Edit/Replace Window
- Replace a Shape
- Edit a Shape
- Crop or Cut Part of a Shape
- Create a Multi-Shape Polygon
- Buffer a Shape
- Generalize a Shape
- Move a Shape
- Copy the Project Shape as Action
- Update Project Shape to Action Shape
- Show or Hide Sensitive Shape

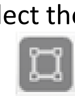
Shape Creation and Editing

When creating a plan, project or action, the location must be mapped (i.e. represented on the map as a polygon).

- The Feature Editor (left side dock) is where the polygon can be mapped and edited.
- The Feature Editor will open automatically when using the Guided Process Tool to create a new project or a new action.

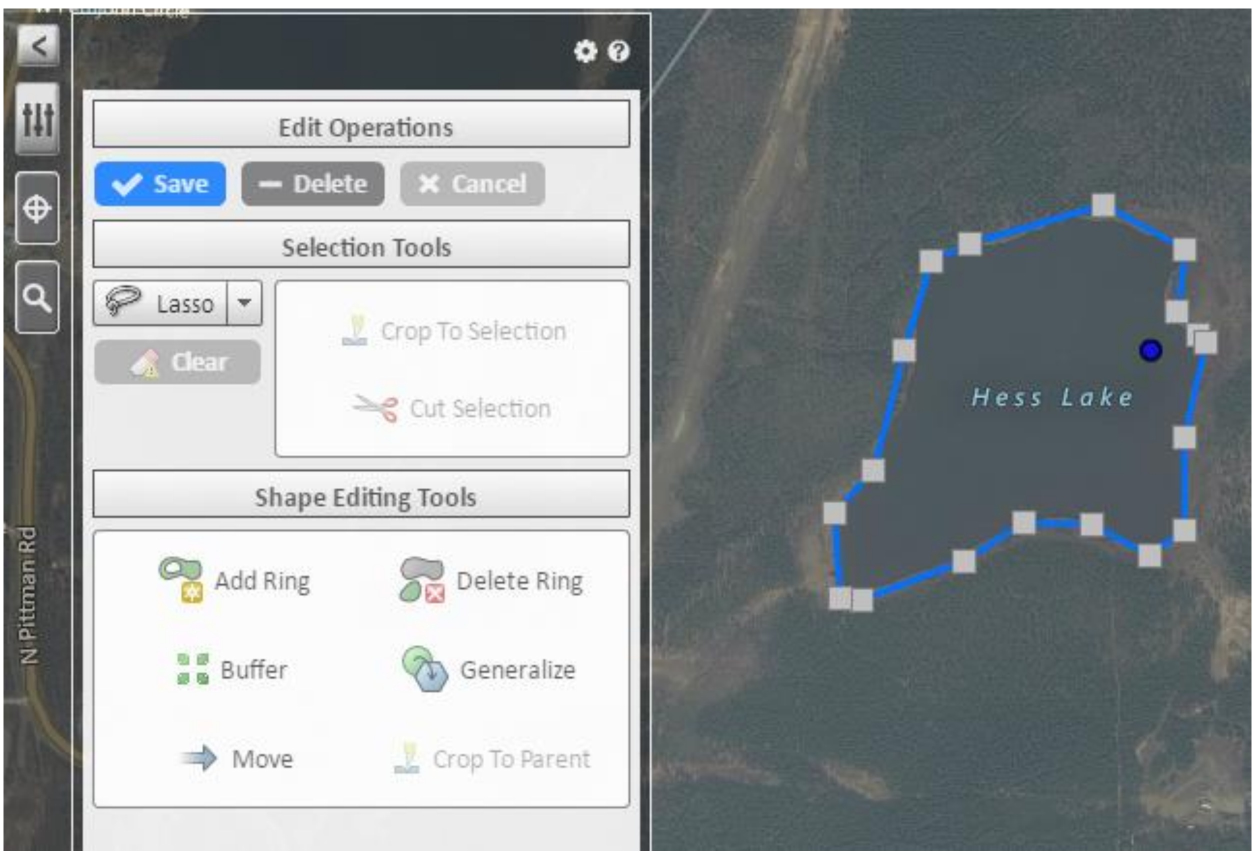
Tip: The Feature drawing tools may be grayed out if the map is "Not at an Editable Scale" (zoom in to an editable scale if needed). An action can only be created if a project is selected first (the project will be displayed as the "active record" at the top of the window).

Create a Shape

1. Select the appropriate feature drawing tool for the Plan, Project or Action:
    -  The **Freehand Polygon** tool allows you to draw the boundary of a polygon in freeform (i.e. a contoured shape). The freehand polygon is created by holding down the left mouse button, outlining the desired location on the map and then releasing the left mouse button.

-  The **Geometric Polygon** tool allows you to draw the boundary of a shape based on fixed vertices and lines (i.e. a linear shape). The geometric polygon is created by clicking and releasing the left mouse of the map to a single vertex. Continue clicking the left mouse button at each change in direction. Double click the left mouse button to complete the polygon.
-  The **Select Existing Boundary** tool (also known as the Geopicker tool) allows you to select a shared shape from a list of pre-determined boundary types (Political, Hydrological, Coastal etc.).
-  The **Import Shapefiles** tool allows you to create Plan, Project, or Action boundaries from data produced by GIS software. The shapefile import tool accepts all local coordinate systems and translates the shape into the flat webmercator map display.

2. Once the shape has been created, click **Save**. If the shape needs to be edited first, see the next section on how to edit or replace a shape.



<u>Select an Existing Boundary Tool (Geopicker) Options:</u>

Boundary Type	**Available Layers**	**Description**
Political	All U.S. States and Territories	Selects the entire United States with **ALL** U.S. states and territories (used for national projects only).
	Congressional Districts (112th)	Congressional Districts by state
	Counties	Counties by state
	States	Select one or more states/territories
	Tribal Areas by Region (AIANNH)	Tribal Areas listed by region for American Indian Alaska Native and Native Hawaiian areas (more info here: https://tracs.fws.gov/learning/mod/forum/discuss.php?d=91)
	Tribal Areas by State (AIANNH)	Tribal Areas listed by region (more info here: https://tracs.fws.gov/learning/mod/forum/discuss.php?d=91)
	Tribal Subdivisions by Region	Tribal Areas listed by state (more info here: https://tracs.fws.gov/learning/mod/forum/discuss.php?d=91)
	Tribal Subdivisions by State	Tribal Sub-divisions listed by state (more info here: https://tracs.fws.gov/learning/mod/forum/discuss.php?d=91)
Hydrological	Regions (2-digit), Subregions (4-digit), Basins (6-digit), Subbasins (8-digit)	Hydrological regions provided by the U.S. Geological Survey that are divided into successively smaller units and are nested within each-other, with the largest unit listed as 2-digit and the smallest as 8-digit
Coastal	Coastal Jurisdiction by State or Area	Coastal jurisdiction provided by the U.S. Census Bureau that define offshore boundaries and coastal waters by state or area
State-Specific Shared Shapes	See the list of current states in the system	Commonly used shapes provided by the states and added to the drop-down list (examples: state wildlife management areas, towns, game units, refuges, fish regions, etc.)

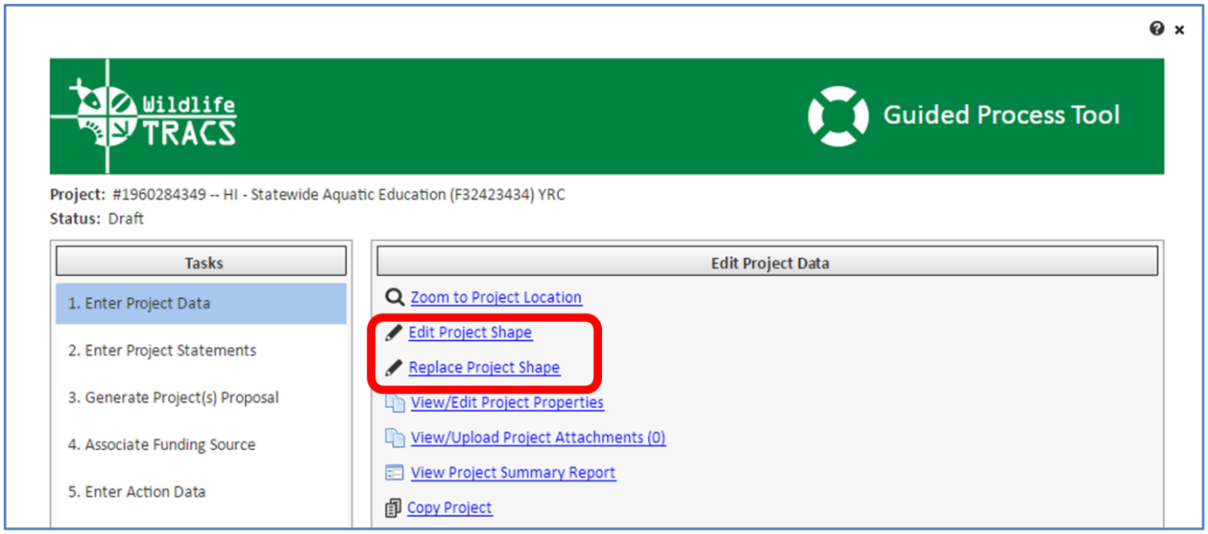
For more detailed information about Geospatial Layers in TRACS, visit:
https://tracs.fws.gov/learning/mod/book/view.php?id=75&chapterid=134

Tip: Use the Shift key to select several layers contiguously or the Ctrl key to select layers non-contiguously. You can only select multiple layers that are within the same selection box.

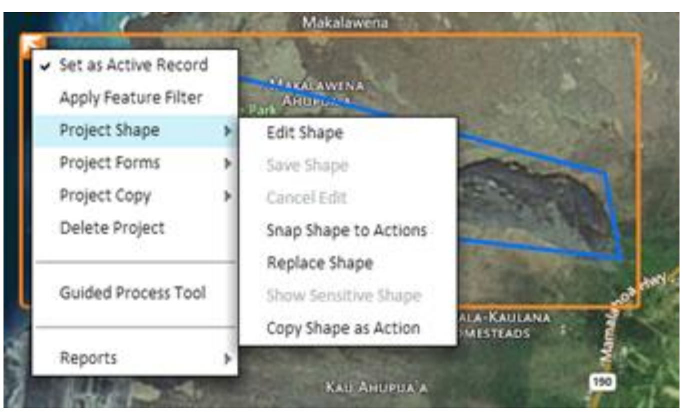
Open Shape Edit/Replace Window

If you have already saved the shape, reopen it using one of the three methods below:

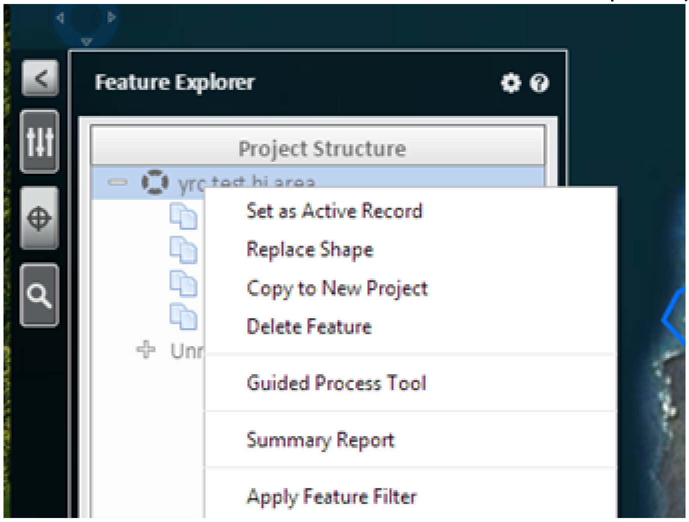
- For a Project or Action, open the Guided Process Tool:
    - **Project Shape:** Select Task 1 Enter Project Data (left side) and click **Edit Project Shape** or **Replace Project Shape**.
    - **Action Shape:** Select Task 5 Enter Action Data and click **Edit Action Shape** or **Replace Action Shape**.



    - Locate the polygon on the map and click inside the shape's boundary to open the orange **Feature Frame** box around it. Click on the arrow in the upper left to open the menu. Select the Shape menu and select **Edit Shape, Replace Shape** or one of the other tools.



- From the Feature Explorer window (left side), **right click** on the name of the plan, project or action to open a menu of similar options. Click **Replace Shape** (or select **Guided Process Tool** to choose from other options).



Replace a Shape

Select **Replace Shape** using one of the methods listed above. The Edit Operations window will open allowing you to create the new shape using any of the feature drawing tools. Once the new shape is saved, it will replace the existing one.

Edit a Shape

NOTE: Shared shapes (selected using the Geopicker Tool) cannot be edited (use replace shape instead).

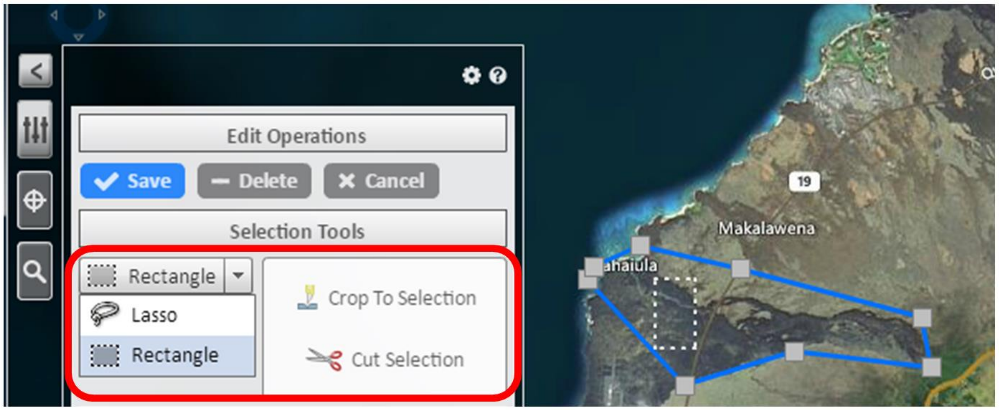
Select **Edit Shape** using one of the methods above in step 1. The Edit Operations window will open. The shape can be edited by using the tools in the window or by editing the shape itself (click on the boundary to move it). The options at the top allow you to Save, Delete or Cancel.

- CAUTION: If you delete a shape, it will delete all the associated data with it (i.e. if you delete the project shape, all associated project data is also deleted).

Crop or Cut Part of a Shape

Click the drop down menu for **Lasso** and select **Lasso** to create a free-form shape or the **Rectangle** to draw a rectangular shape. The shape will flash in black and white.

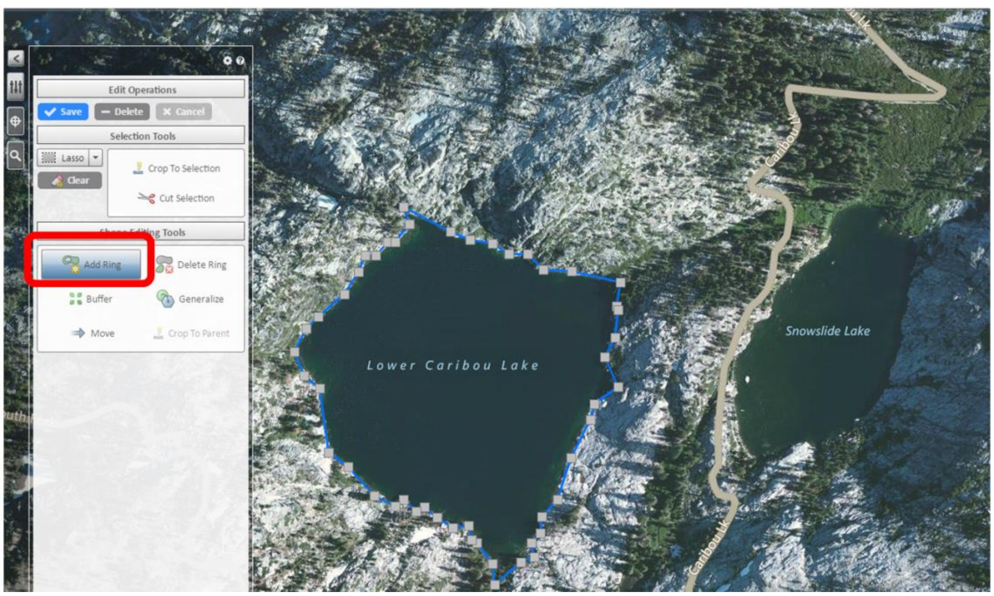
- To exclude an area within the shape boundary, select the area you would like to exclude and click **Cut Selection**.
- To crop an area from the shape, select the "good" area and click **Crop to Selection.**



Create a Multi-Shape Polygon

To create a multi-shape polygon (multiple distinct geographic areas or rings in one plan/project/action):

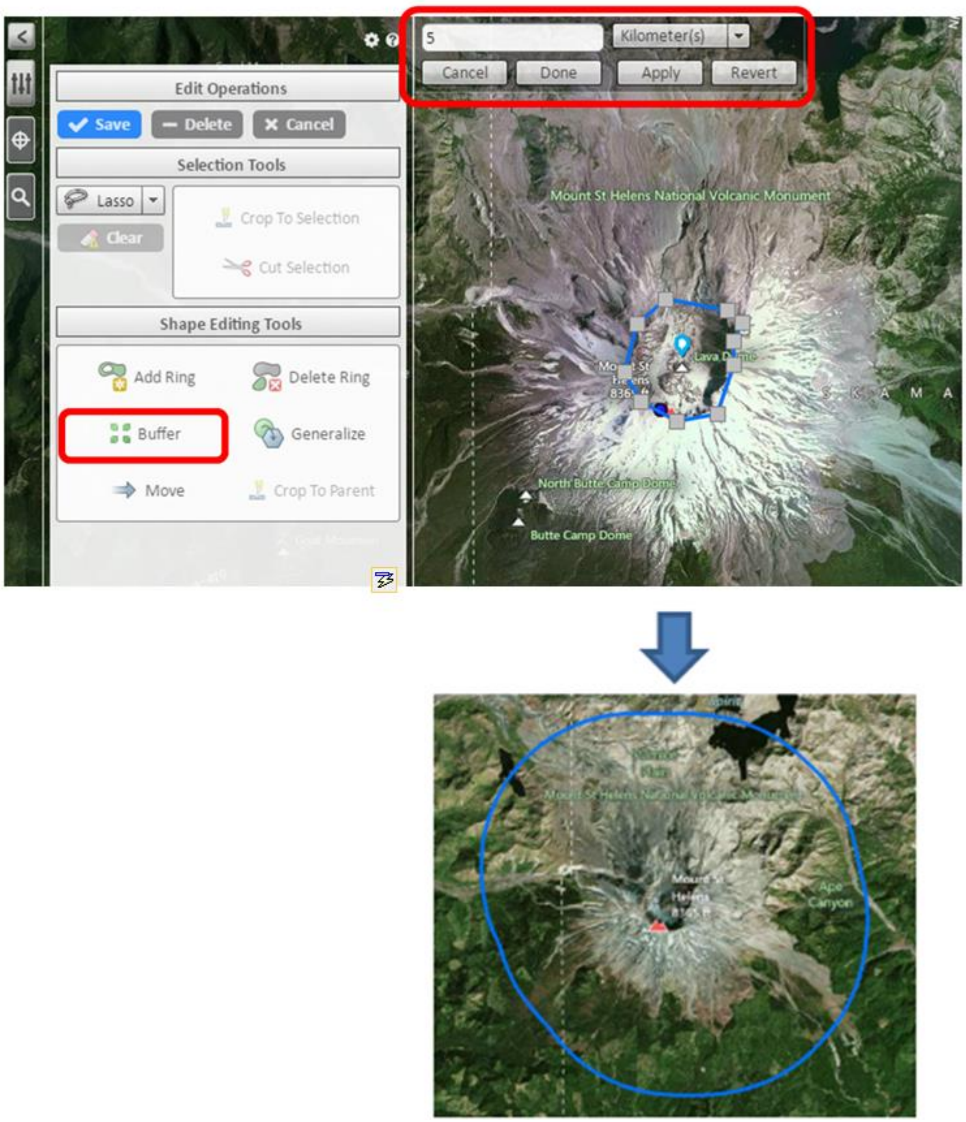
Draw the first shape and then click **Add Ring** to draw another shape to be added to the plan, project or action area. Use the **Delete Ring** button to remove it. Once all rings have been added, click **Save**.



The map will now display the rings as part of the overall project, plan or action area.

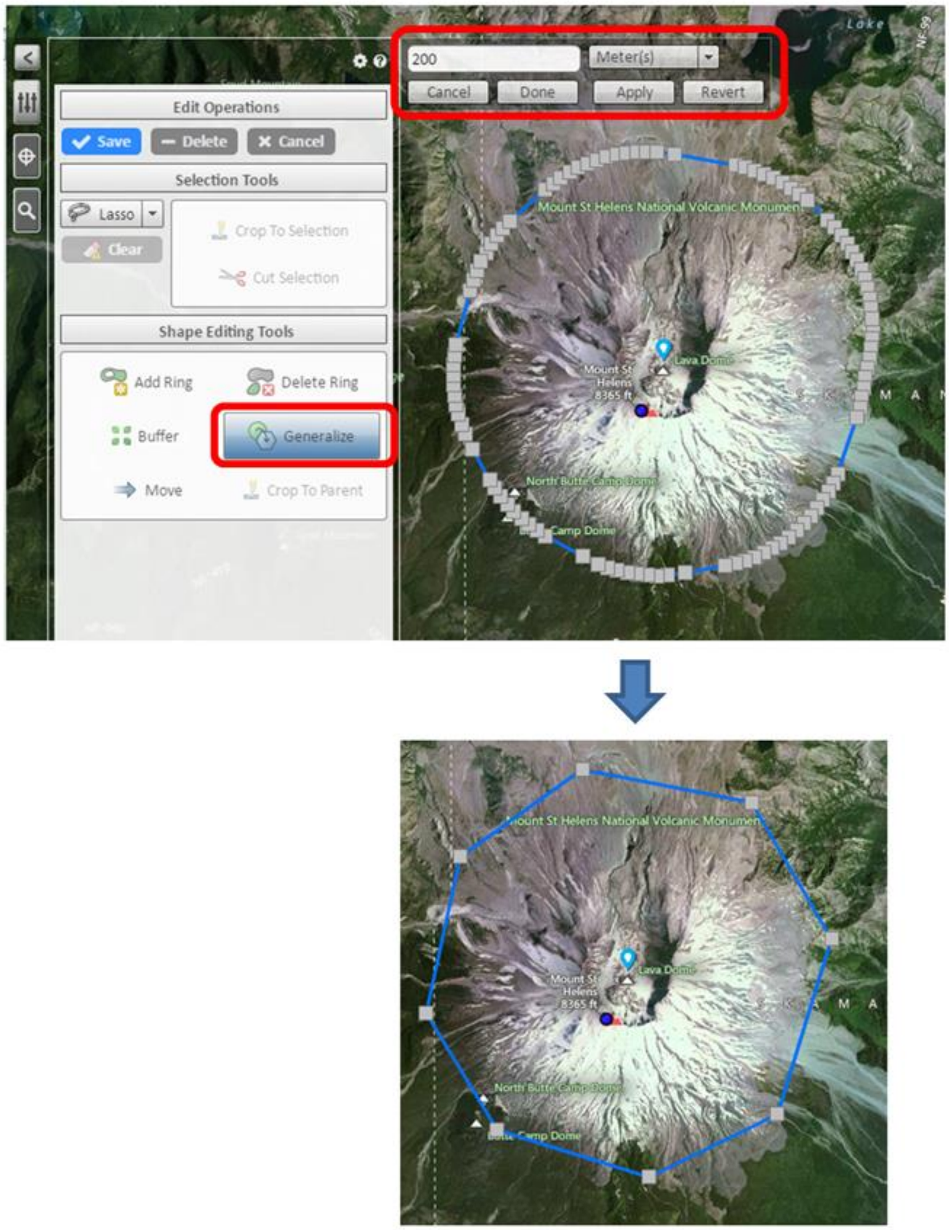
Buffer a Shape

- To extend the area around a shape, click **Buffer** and fill out the box that opens to the top right of the window.
- Enter the amount and select the measurement from the drop down menu (meters, kilometers, miles or feet). (Note: using a negative value with shrink the feature by the specified distance).
- Click **Apply**.



Generalize a Shape

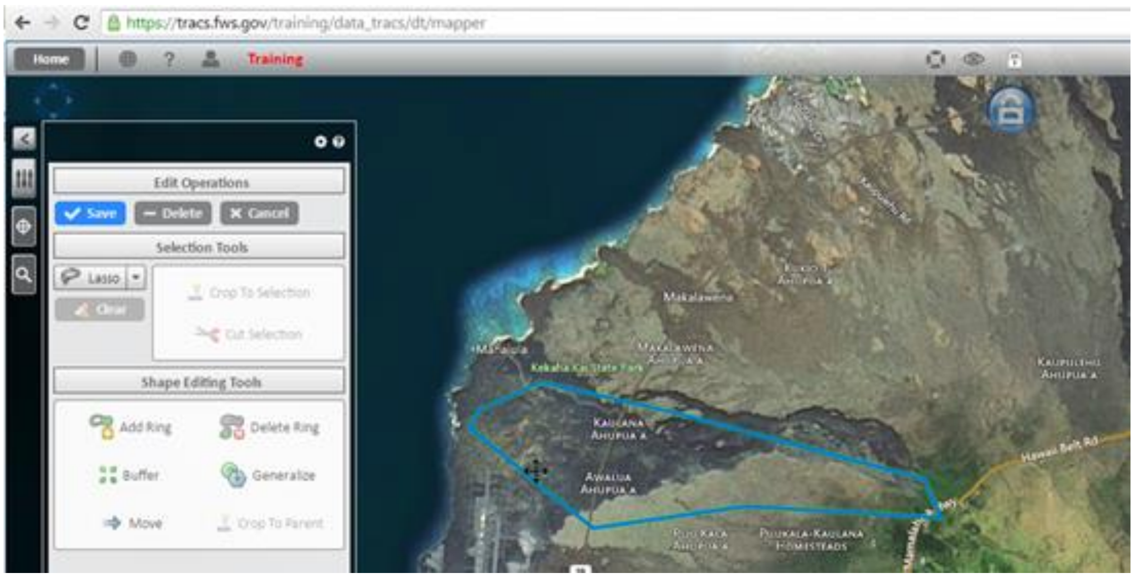
- Click **Generalize** to simplify a shape by reducing the number of vertices (gray boxes indicating changes in direction).
- Enter the amount and select the measurement from the drop down menu (meters, kilometers, miles or feet).
- Click **Apply**.



Move a Shape

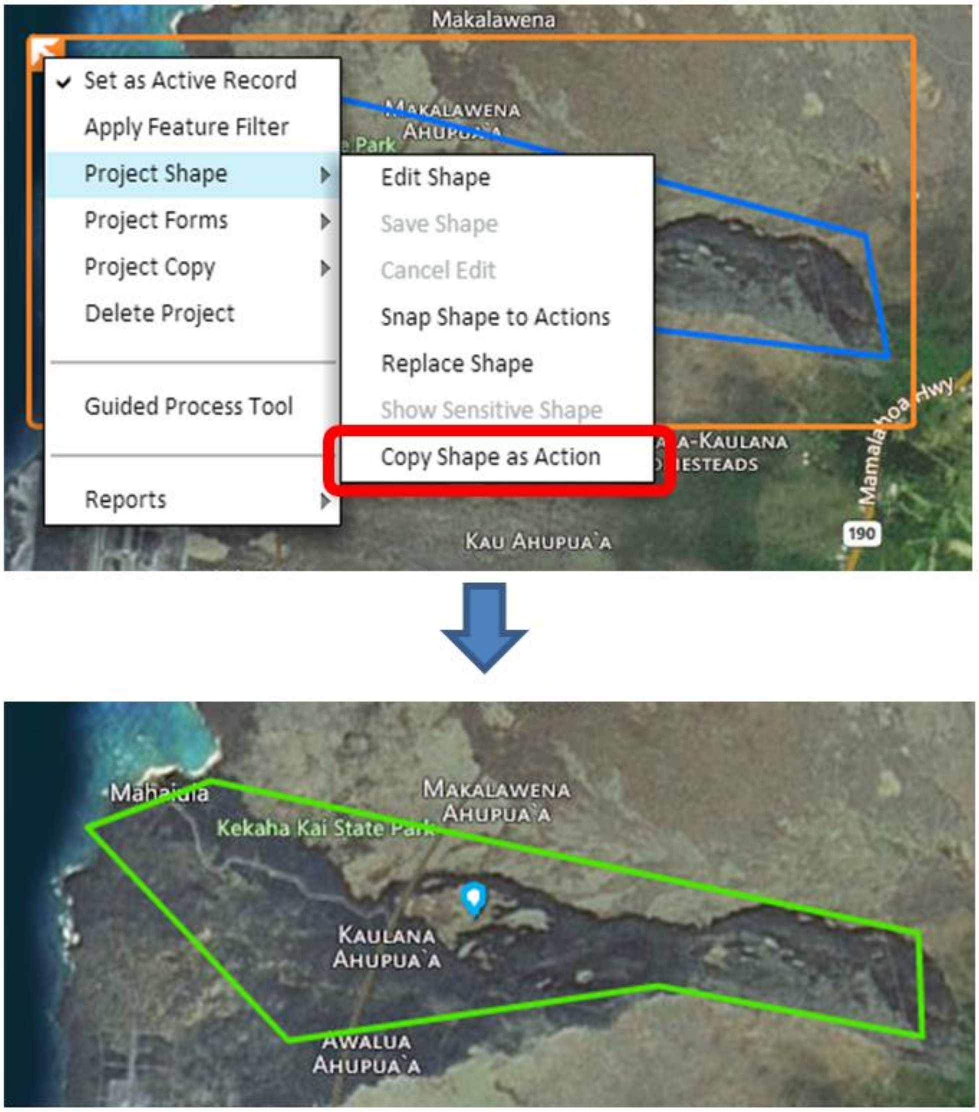
- Click on the lock icon (middle of the top toolbar) to lock the screen from moving (a blue lock icon will appear at the top of the screen).

- Click the **Move** button and a black arrow will appear on the screen. Select the feature to drag and drop it to a new location. Then click **Save**.



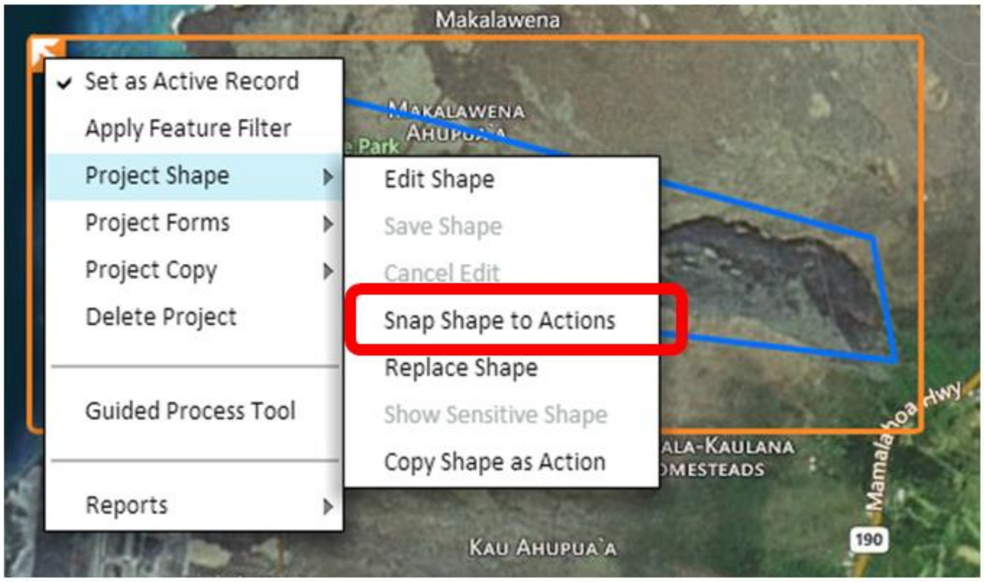
Copy the Project Shape as Action

- Locate the project polygon on the map and click inside the shape's boundary to open the orange Feature Frame box around it. Click on the arrow  in the upper left to open the menu.
- Click on Set as Active Record if a checkmark is not present (Note:This does not change the project status to active. It is used to mark a project shape as the active feature in order to associate an action to that project).
- Select the Shape menu and select Copy Shape as Action. The action shape will appear in green and the window to enter action data will open.
- For more information visit **Chapter 8: Copying the Project Shape as the Action Shape**.



Update Project Shape to Action Shape

- Locate the project polygon on the map and click inside the shape's boundary to open the orange "Feature Frame" box around it. Click on the arrow  in the upper left to open the menu.
- Select the Shape menu and select Snap Shape to Actions.

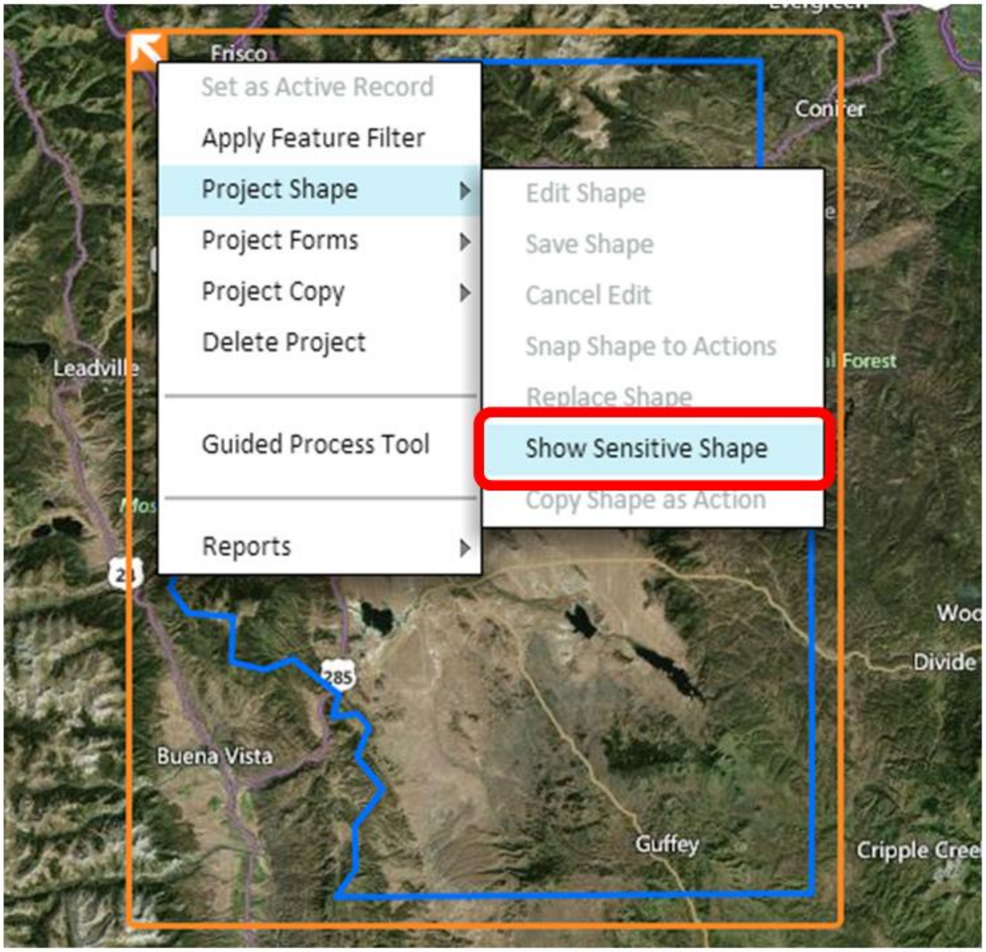


- If you create a new action that is outside the boundary of the project, this error message will appear:
  - Click Auto Correct to update the project shape to include the action boundary.
  - Click Dismiss to edit the action shape. Use the Crop to Parent button to crop the action area to the project boundary.

Show or Hide Sensitive Shape

- If a project is marked as sensitive on the Project Properties form, the shape will be buffered (or extended) to the county or state boundary so the exact location is not shown on the map or displayed on public reports. Also keep in mind that projects marked "Sensitive" are not displayed in the Public Conservation Viewer.
- Locate the project polygon on the map and click inside the shape's boundary to open the orange Feature Frame box around it. Click on the arrow in the upper left to open the menu.
- Select the Shape menu and select Show Sensitive Shape. A checkmark will appear next to "Show Sensitive Shape" and the map will show the exact project polygon location.

- Uncheck the selection to buffer (hide) the location again.



Lesson 13: Import Shapefiles

This chapter covers how to import a shapefile. A **shapefile** is a data storage "vector" or unit containing a group of related files that describe the location, shape and attributes of a specific geographic feature. A shapefile is created using GIS (Geographic Information System) software. The **shapefile import tool** in TRACS allows users to import a shapefile from external GIS software as the plan, project or action shape.

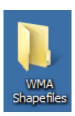
Shapefile Requirements:

Before you can import the shapefile into TRACS, you will need to save the data from your external mapping system as a **zip file** and then download it to your computer. The TRACS shapefile import tool requires a zip file that contains **standard shape file extensions**. The shapefiles must contain only polygon data and must have a coordinate system (.pri) file. A zip file may contain more than one shapefile and its associated extensions. The shapefile import utility does **not support 3-dimensional data**, therefore these **two geometry properties must be disabled** in order for the shapefile to be successfully imported.

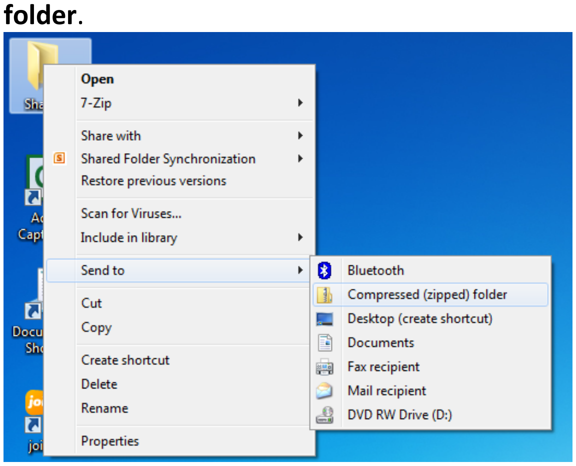
For more detailed information about shapefiles, visit the TRACS Guidance FAQs Geospatial Information chapter (see #9 for additional restrictions and tips): https://tracs.fws.gov/learning/mod/book/view.php?id=75&chapterid=108.

Steps to Import a Shapefile:

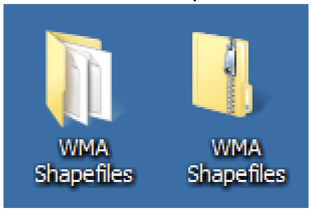
1. After exporting the files from your external GIS software, assemble your GIS file extensions (e.g. .shp, .dbf, .prj) in one folder.



2. To zip the file, right-click on the folder you created and select **Send to Compressed (zipped) folder**.

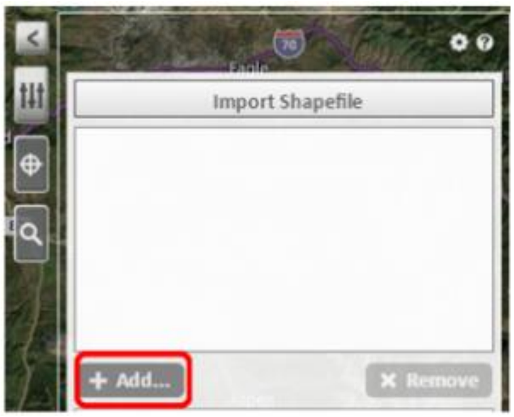


3. This creates a zip file in the same location as the original folder.

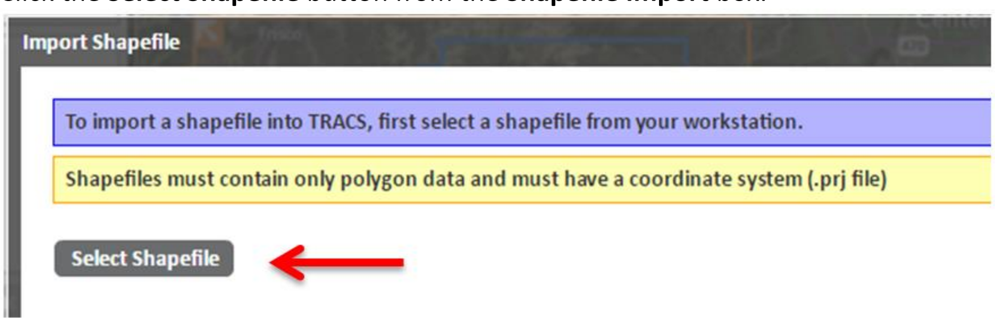


4. In TRACS, use the Guided Process Tool to create a new project or action. For a plan, select the feature editor dock on the left. Select **Import Shapefile** (folder icon) for the appropriate feature (project, plan or action).

5. Click the **Add** button from the **Import Shapefile** window.

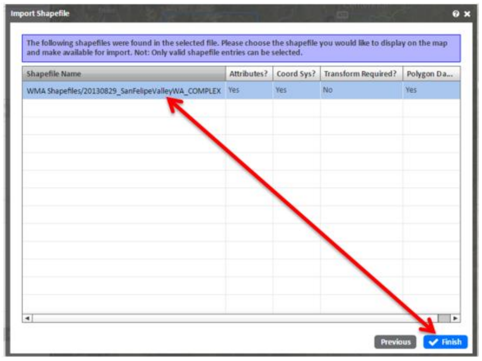


6. Click the **Select Shapefile** button from the **Shapefile Import** box.

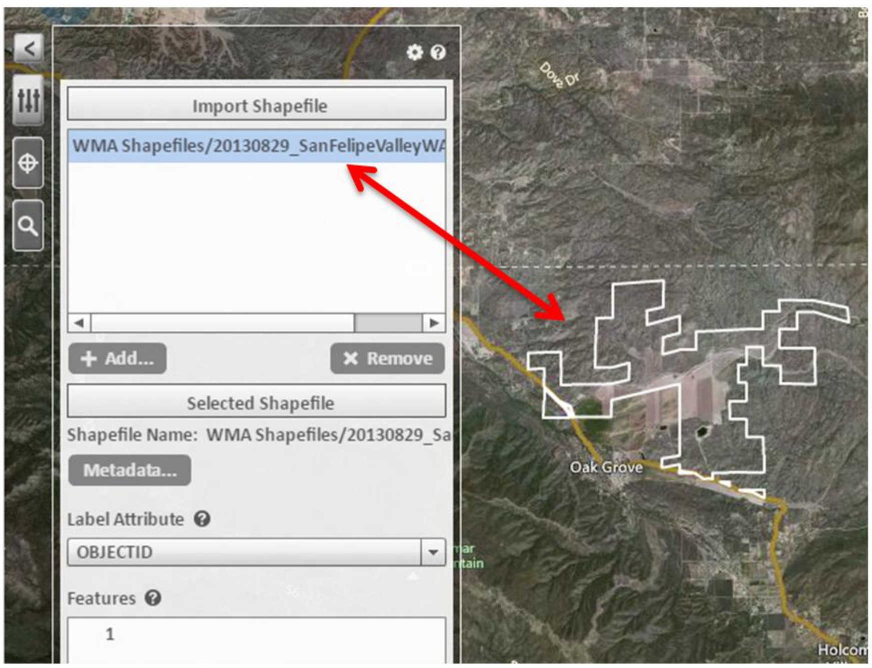


7. Navigate to the folder on your local machine where you created the zip file and click the **Open** button.

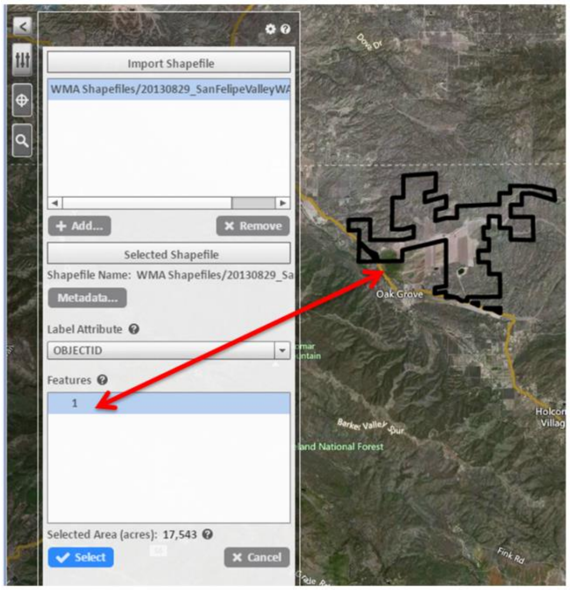
8. Select the shapefile and then click the **Finish** button. Note: The **Coord Sys** and **Polygon Data** columns must display "Yes" in order to import the file.



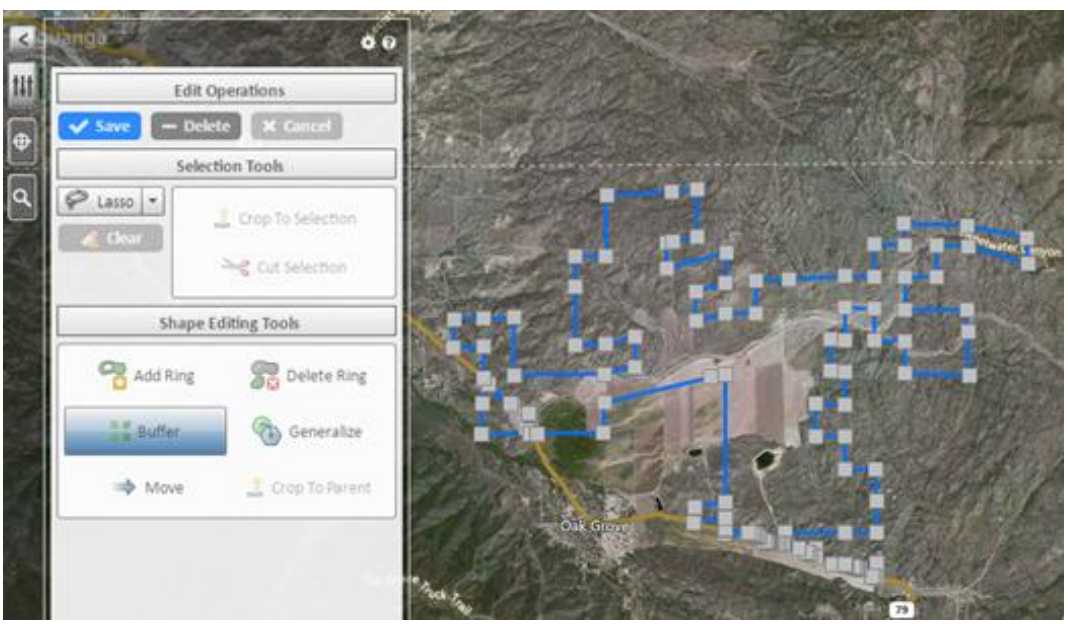
9. The shapefile is now imported but has not yet been saved. Select the shapefile name in the top box (highlights in blue). The shape will appear on the mapper outlined in white.
    - Optional: Select an attribute from the **Label Attribute** drop down list to change how features are labelled.



10. Click on a feature to display it on the mapper in black**.** To select more than one feature, hold the Shift or Ctrl key down to select them. Click the **Select** button to select the feature as the project shape.



11. The black outline is converted to a blue **Project** boundary (or a green boundary for an action or red for a plan). Edit the shape if needed and click **Save**. This will open the Project form to begin data entry.



Lesson 14: Copying and Deleting Projects

This chapter covers how to copy and delete projects from TRACS. Copying a project can be very helpful and save you a lot of time if you already have a well-written project that you want to reuse. Copying a project is something that you want to consider before creating a new project from scratch. Deleting on the other hand may sound self-explanatory, but it is important to clean up unfinished or dead projects so they do not show up on public reports.

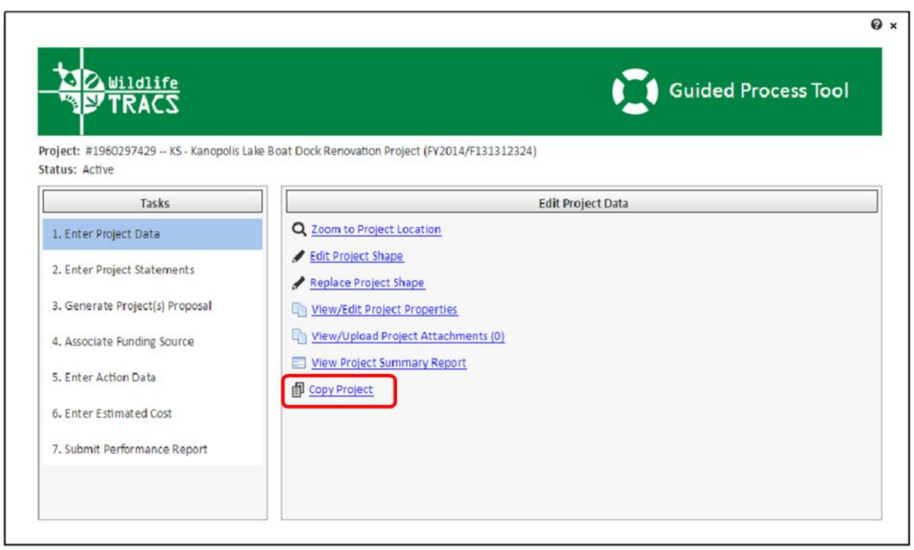
Go to the next sub-chapters for more information on how to:

- Copy a Project
- Delete a Project

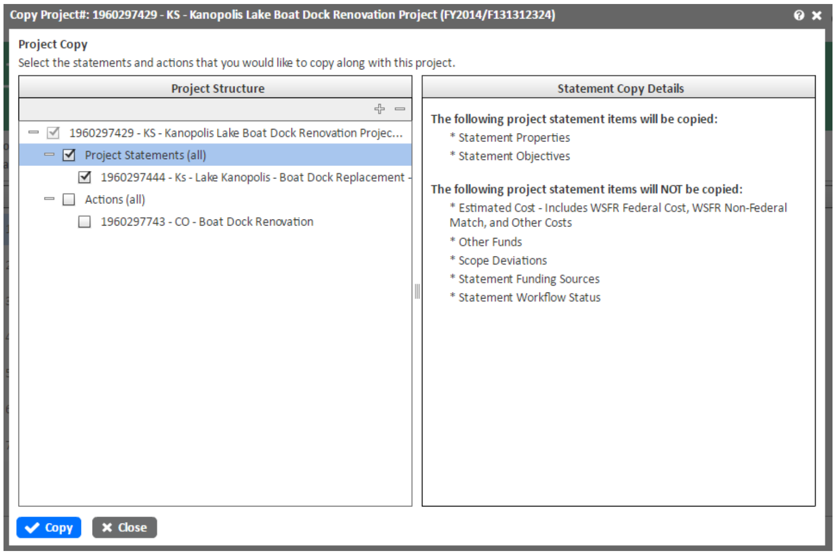
Copy a Project

The Copy Project button allows users to copy an existing project to create a new project titled "Copy of" (title of project). Note: The Copy Project option is not available for Legacy Projects.

1. Select Task 1: Enter Project Data and select **Copy Project** on the right side.

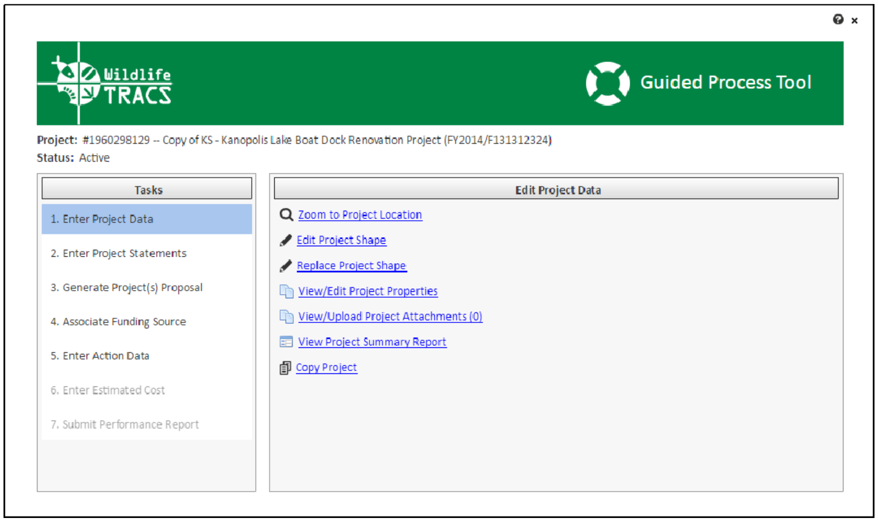


2. The Project Copy window will open. Select the statements and actions that you would like to copy along with this project by checking the boxes and click **Copy.**

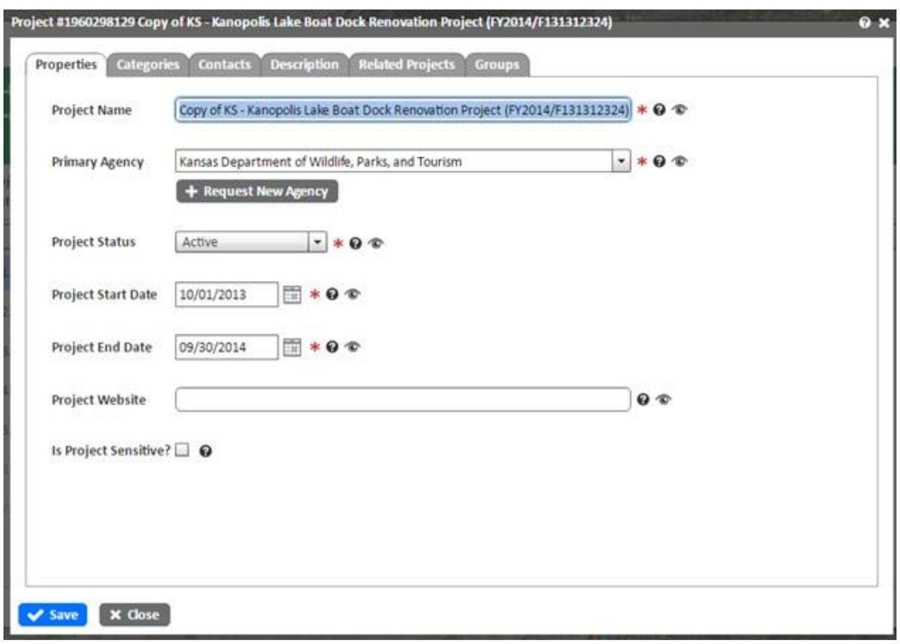


3. Click Open Copy in Guided Process Tool button.

4. The copy will open. Select **View/Edit Project Properties** on the right side.



5. Update the Project Name, removing "Copy of" and click **Save**. Then proceed with updating or entering project information.



Delete a Project

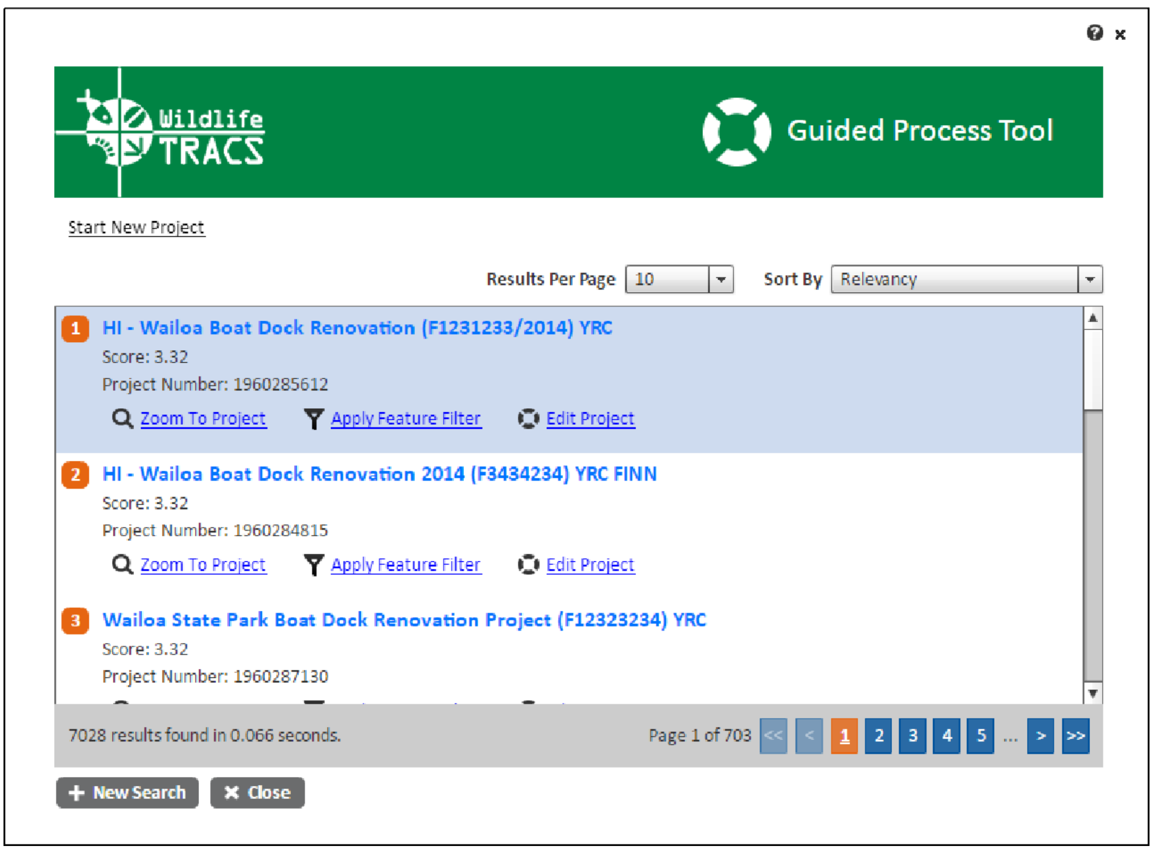
There are at least two ways to delete a project in TRACS. The easiest method is documented below (with some alternative methods also listed further down).

CAUTION: To delete a project, plan or action, delete the polygon or shape. Deleting a polygon (or shape), will delete all associated data.

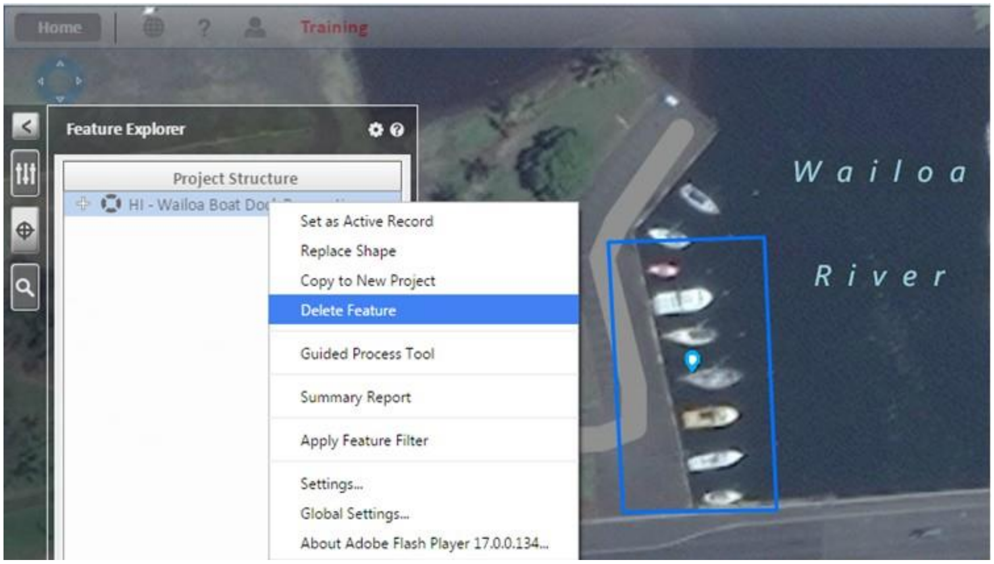
TIP: The Project cannot be deleted once it has been approved without rescinding approval. To delete an approved project, the federal approver must first "Rescind Approval" on the associated Project Statement(s). For more information, go to Chapter 17: Revisions and Amendments.

1. Select the Guided Process Tool (top toolbar) and search for the project by entering the project number or part of the project name.

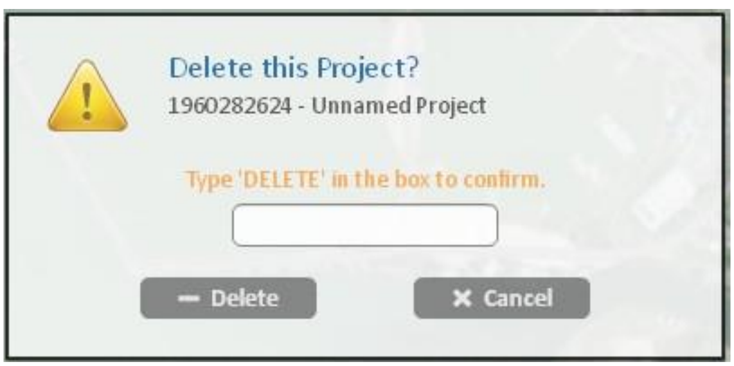
2. In the Search results, select **Apply Feature Filter** (a filter will be created to only see that project on the mapper, which displays on the right side dock).



3. Click on the blue project point on the map to display the Feature Explorer (left side dock). Right-click over the project name to open a menu of options. Select **Delete Feature**.

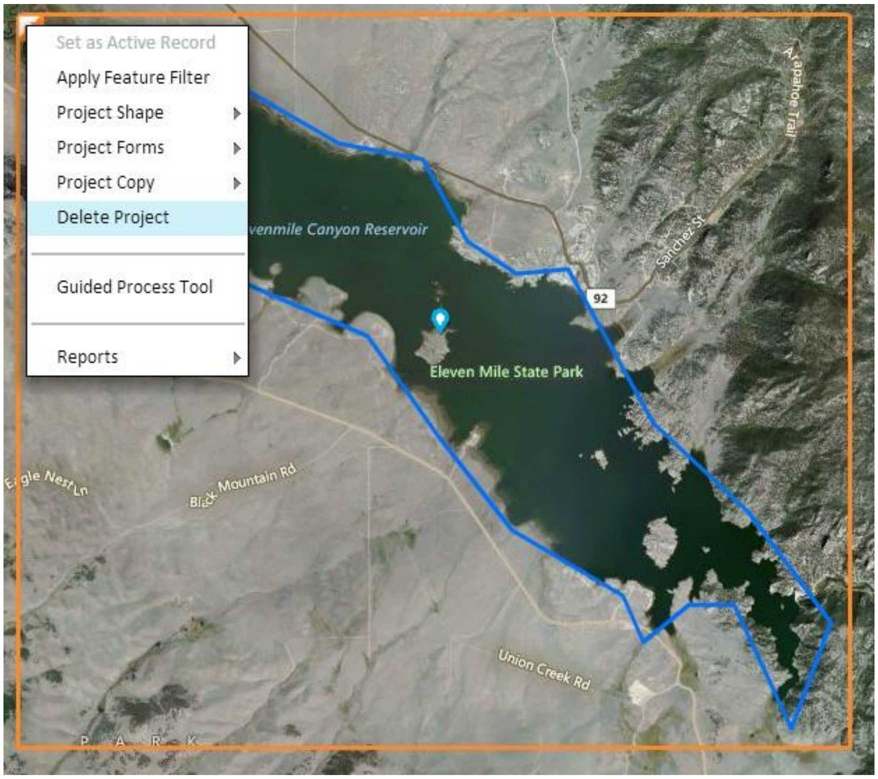


4. The Delete window will open. Type DELETE in the box to confirm and then click **Delete**.

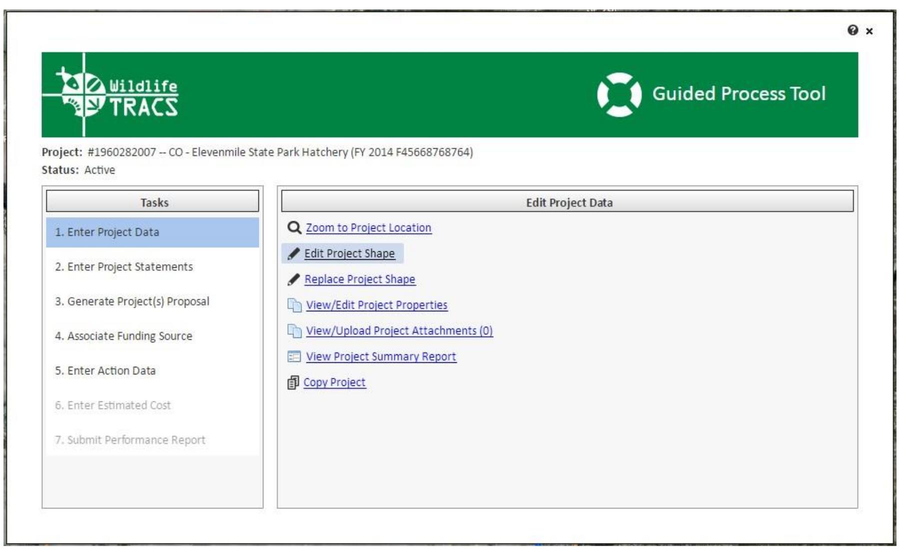


Alternate Methods:

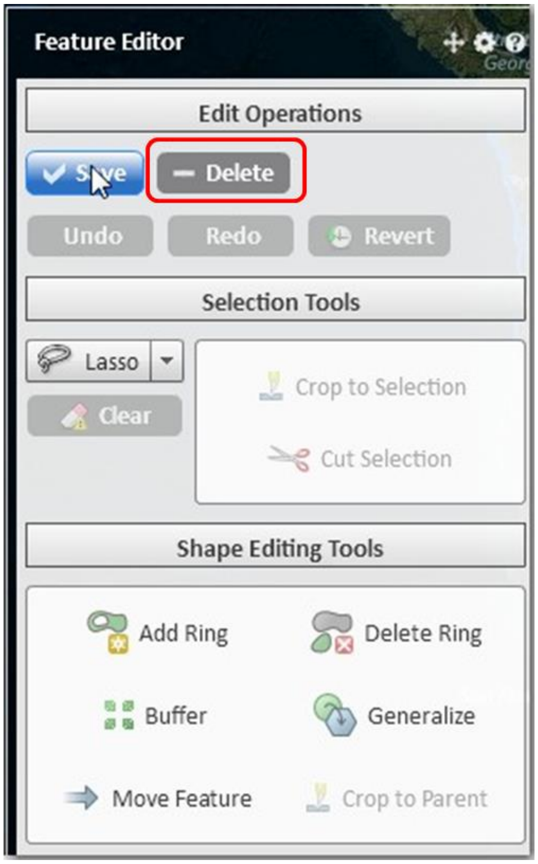
Select the project boundary (in blue) and an orange Feature Frame box will appear around the shape. Click on the arrow in the upper left of the orange feature frame box to open a drop down menu and select Delete Project.



The Delete Project button can also be accessed from the Guided Project Tool for the project. Click on Task 1: Enter Project Data and select Edit Project Shape.



In the Feature Editor window, select the Delete button.



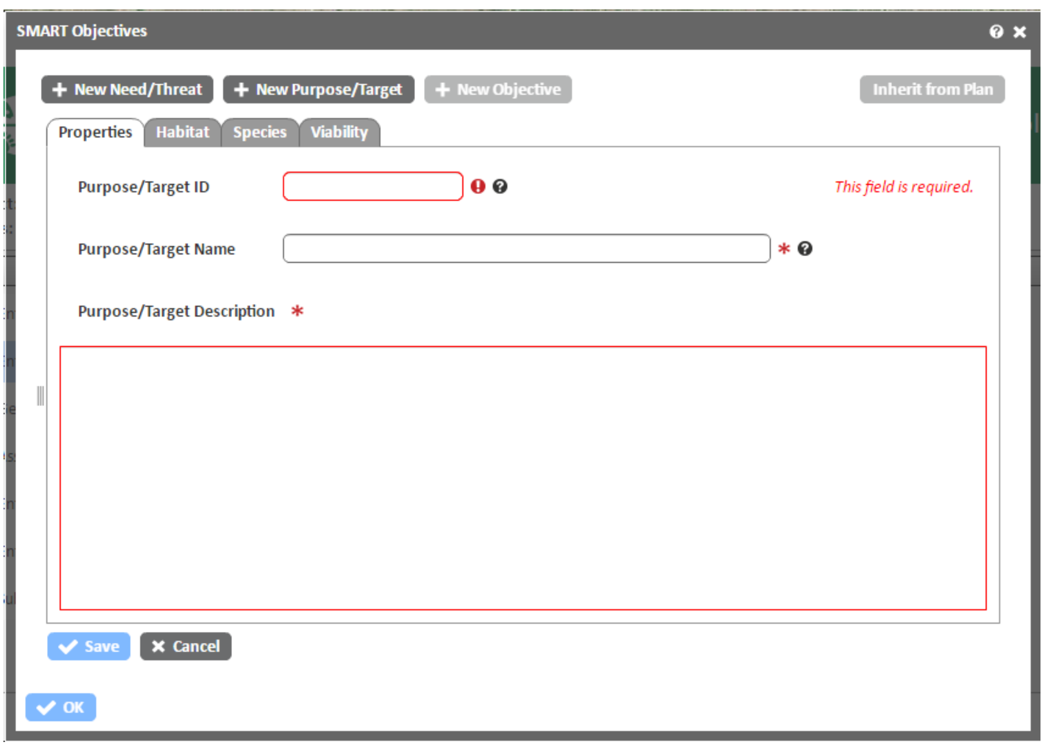
Lesson 15: Habitat and Species

This chapter covers how to enter the specialized fields for projects that impact habitat and/or species. Both of these options have unique options that you need to be familiar with to create good reports in TRACS.

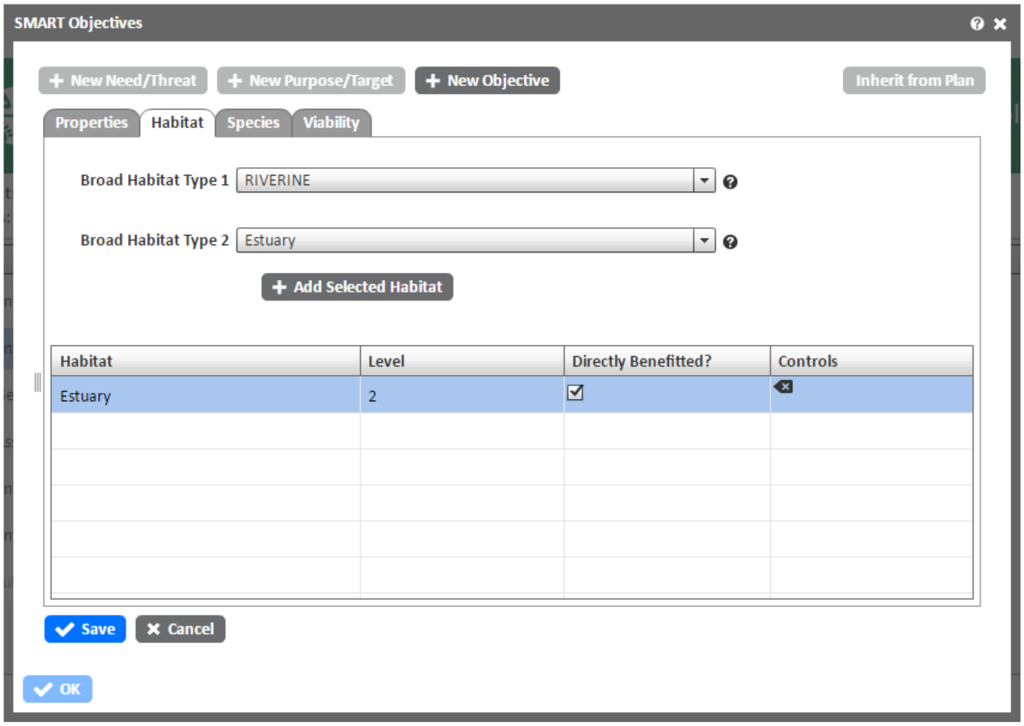
Projects with habitat or species are created in the same way as any other project. This lesson does not go through the entire project entry process; It just goes through the additional steps required to enter a project that impacts habitat and/or species. For more information on the basics of entering a project view lessons 1-10.

When creating the objectives, select the New Purpose/Target button to identify the habitat(s) and/or species targeted by the objected. After entering the ID, name and description, fill out the Habitat, Species and/or Viability tabs as applicable. For more information, view Lesson 5 Entering Objectives.

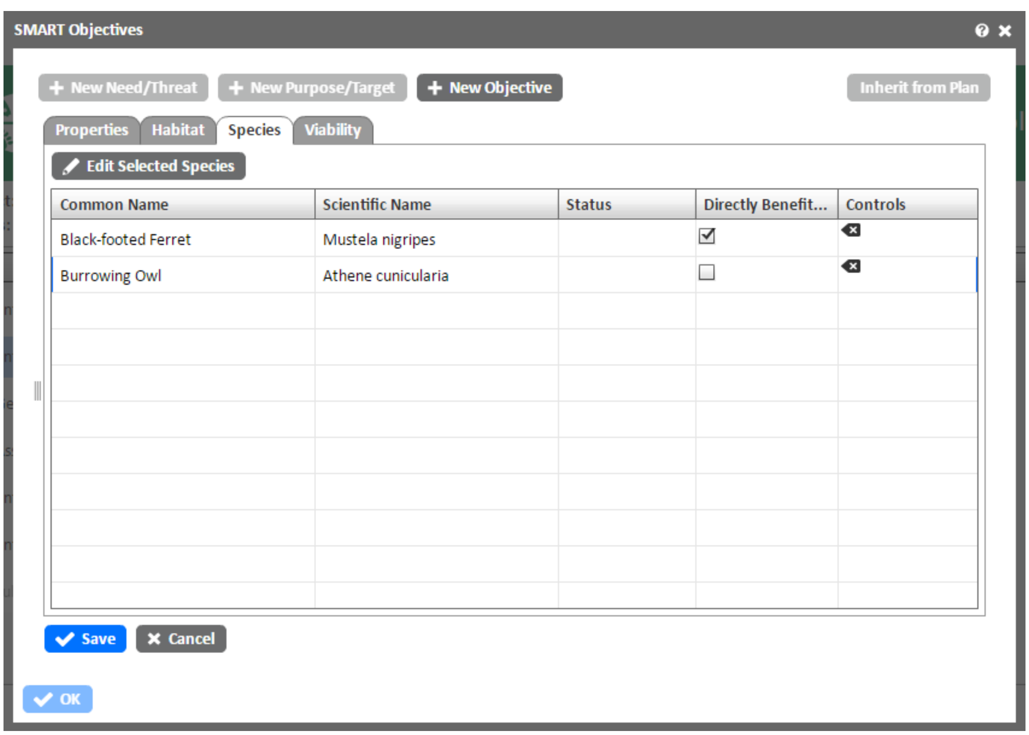
Purpose/Target Properties Tab:



Purpose/Target Habitat Tab:



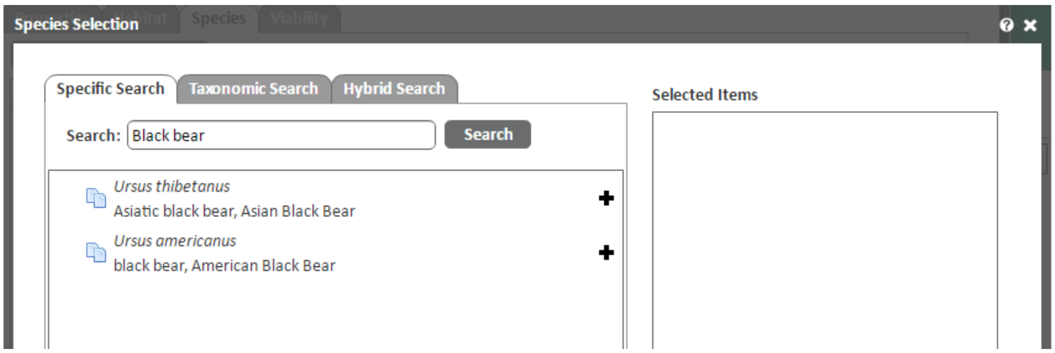
Purpose/Target Species Tab:



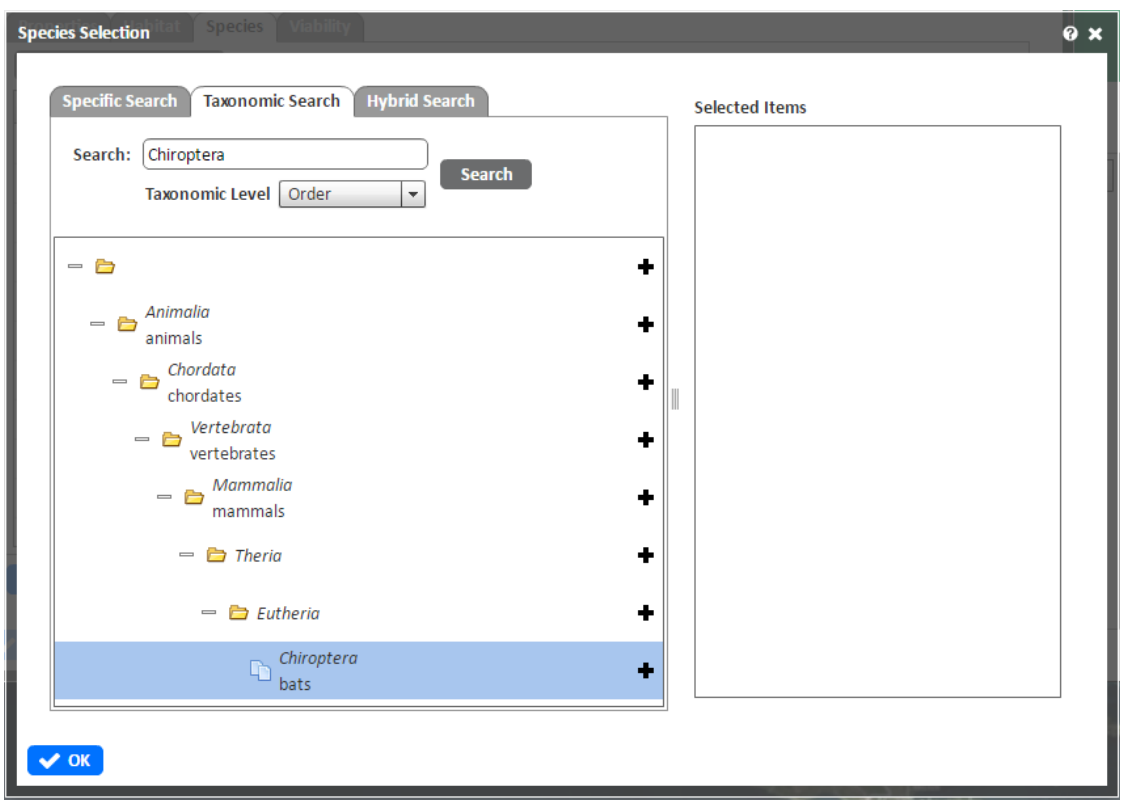
- Add Species with the “Edit Selected Species button”.

- Search for the species using the search tabs:
    - **Specific Search tab:** enter part of the common name or scientific name and click Search.

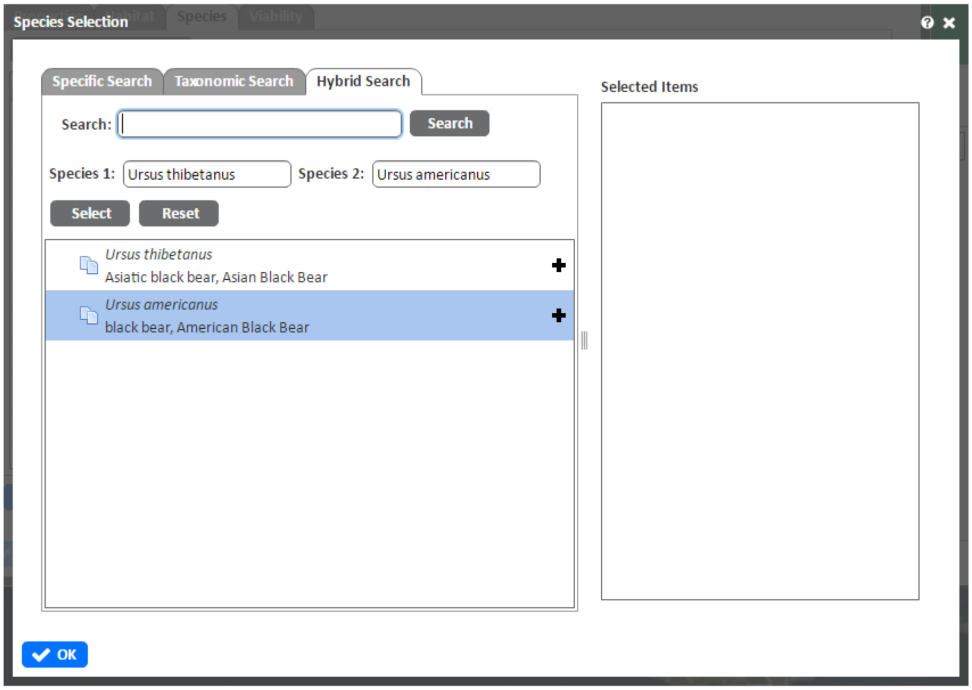
Note: Species information is pulled from the **Integrated Taxonomic Information System (ITIS)**. This list does not currently include additional species search options (such as local names for species in other languages). In the future, we may provide additional species options such as customized lists for particular group(s) and species status information from the Threatened and Endangered Species System (TESS) maintained by the FWS. This task is in the backlog for future development.



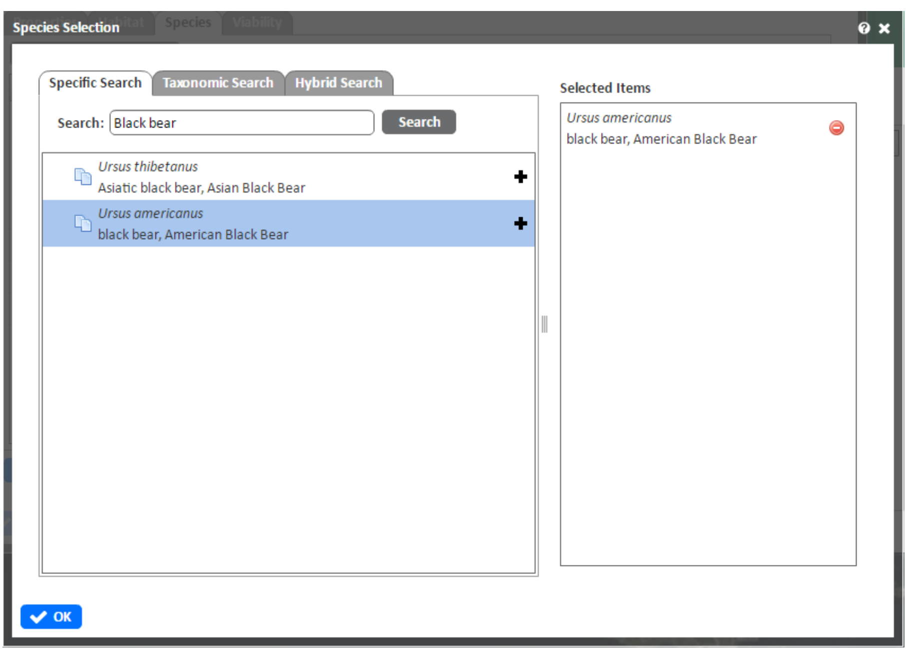
    - **Taxonomic Search tab:** select the taxonomic level (e.g. genus) and enter the name in the search field. Click on the + sign to expand the menu and select the level to add before clicking the + sign to move the item over to the right side.



- ○ **Hybrid Search tab:** search for the species and click the plus sign (+) to add the two species to the Species 1 and 2 boxes (e.g. add a tiger and a lion to create a liger).

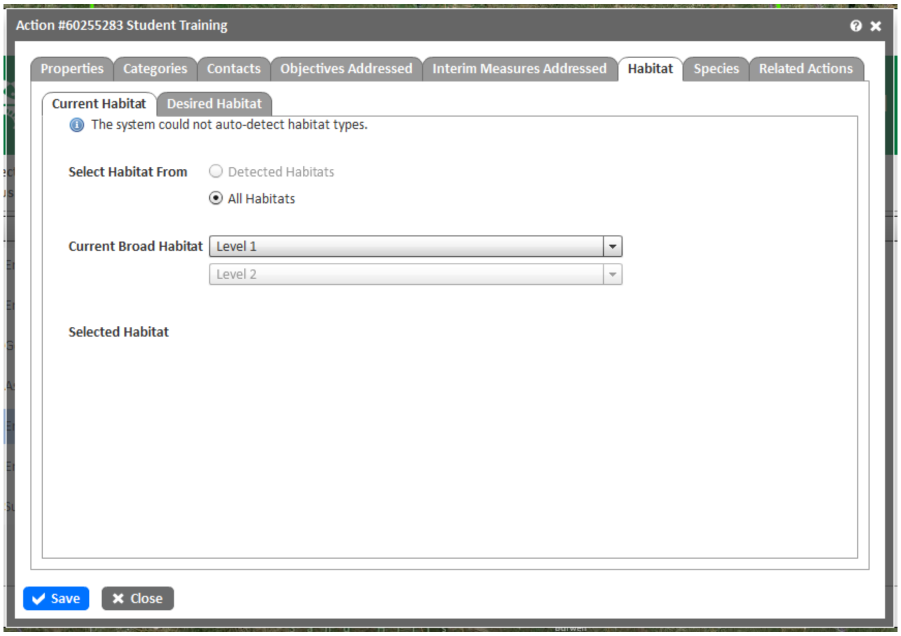


- Click the plus sign to add a species to the Selected items on the right side (or click on the red minus sign to remove a species).

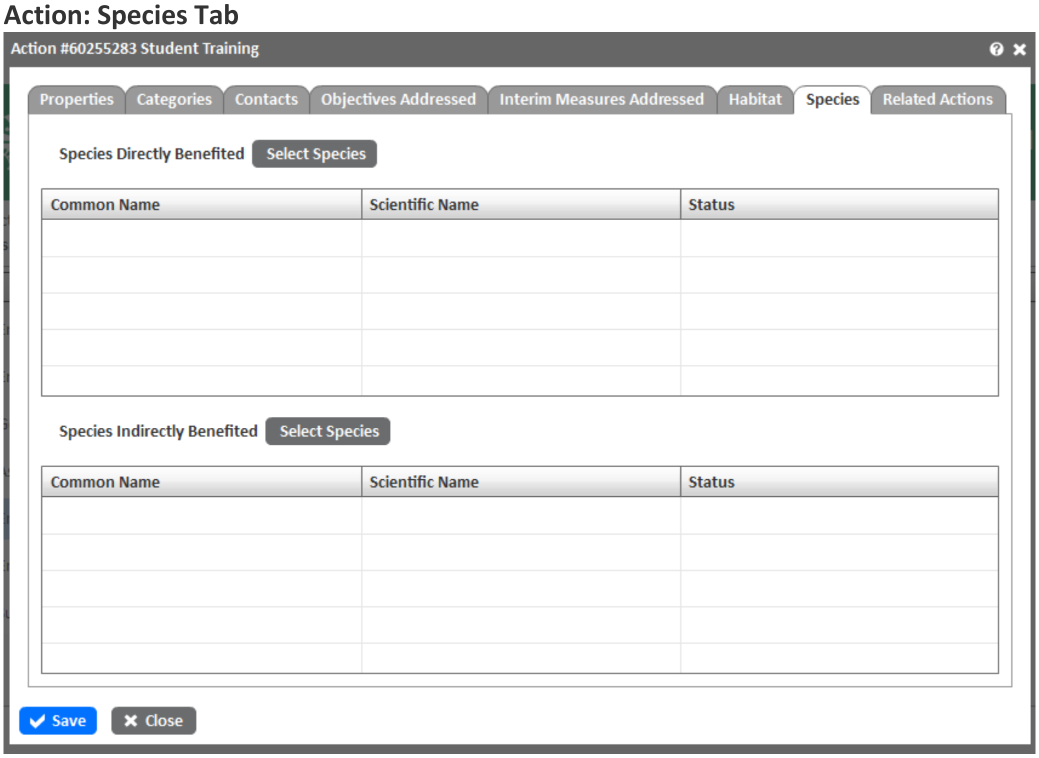


The other place where habitat and species information is documented is on the action form. The Habitat tab is used to document the current and desired habitats affected by the action. The Species tab is used to document species impacted by the action. Use the “Select Species” button by the Directly Benefited or Indirectly Benefitted sections. For more information, view Lesson 8 Mapping and Entering Actions.

Action: Habitat Tab



Action: Species Tab



Lesson 16: Lands Data

This chapter covers how to enter a land acquisition project into TRACS.

TRACS provides a digital record for data on land and property rights (including water and mineral rights) acquired using federal assistance funding or used as match for federal assistance funding.

Important Note: Hard copies of all land records and grant documents still need to be sent to the WSFR Regional Office to be maintained as part of the Permanent Administrative Record, which is the official repository of land acquisitions.

Please visit the Guidance FAQs Lands Data page for more information.

Note: Projects with lands data are created in the same way as any other project. This section does not go through the entire project entry process; it just goes through the additional steps required to enter a project with lands data.

1. Map the project location as you would for any other project. If you intend to copy the project shape as the action shape, make sure the project shape is as accurate as possible (using an imported shapefile may be beneficial). The action shape for land or water rights acquisitions must be mapped with a high degree of accuracy, e.g. it must match the deed or real land acquired within a 0.5% error tolerance.

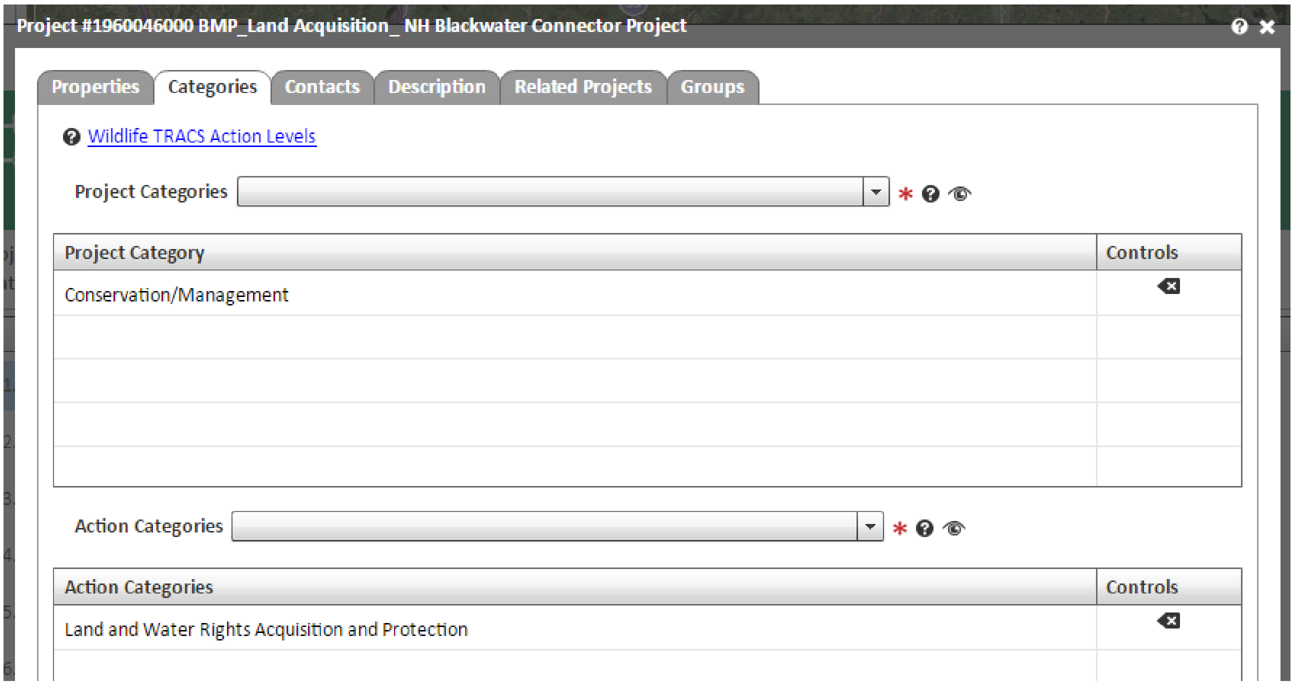
2. If the project contains sensitive information (such as private land owner information, sensitive species etc.), mark the project as sensitive. On the Project Properties form, mark the project as sensitive by checking the box.

   .

   Note: This hides the exact project location on the TRACS mapper by buffering or extending the shape out to the next largest political boundary (e.g. county, state or country). Also keep in mind that projects marked "Sensitive" are not displayed in the Public Conservation Viewer.

3. On the Categories tab, you MUST select **Land and Water Rights Acquisition** as an Action Category (in the lower half of the screen). This generates a Land Record form that needs to be filled out later on when entering an action related to land or water rights acquisitions.

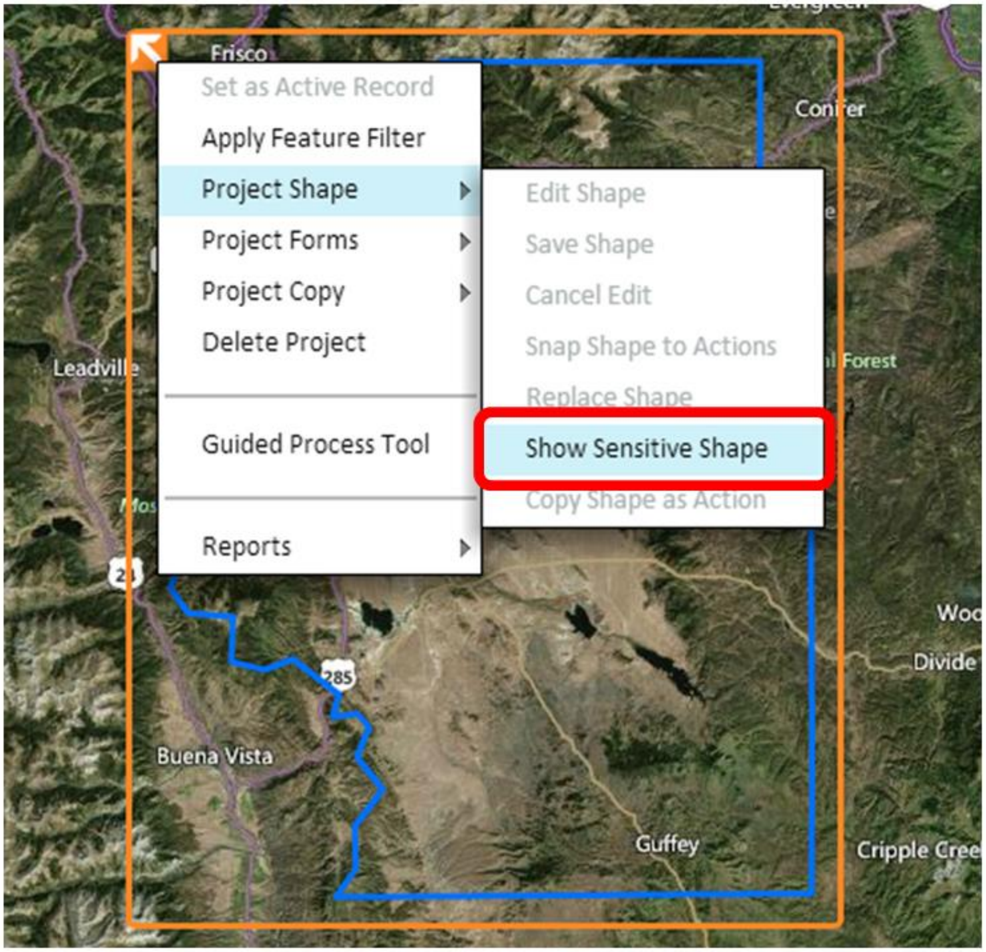


4. Create the action(s) for the project that documents the acquisition of land or water rights.

   TIP: Make sure to select "show sensitive shape" BEFORE you copy the project shape as the action shape. Otherwise, use the drawing tools or import shapefile tool to create the action shape.

   - Locate the project polygon on the map and click inside the shape's boundary to open the orange Feature Frame box around it. Click on the arrow  in the upper left to open the menu.
   - Select the Shape menu and select Show Sensitive Shape. A checkmark will appear next to "Show Sensitive Shape" and the map will show the exact project polygon location.

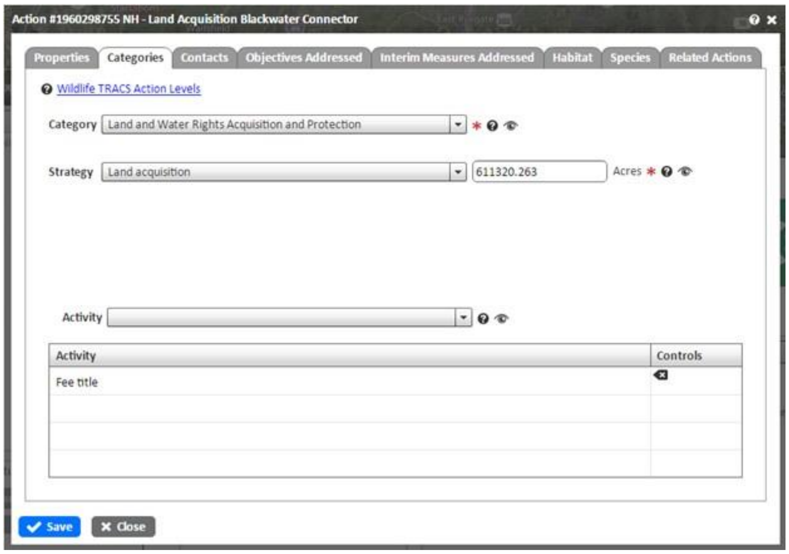
- Uncheck the selection to buffer (hide) the location again.



- **The action polygon must be created with a <u>high degree of accuracy</u>, e.g. it must match the deed or real land acquired. The system requires a less than <0.5% (one half of one percent) margin of error to meet auditing policies for land reconciliation.**

- If the action shape does not meet the margin of error tolerance, warning and error messages will appear later (on the Land Record form and Performance Reports). If a discrepancy occurs, the action polygon(s) in TRACS must be adjusted to match the actual land acquired (deeded).

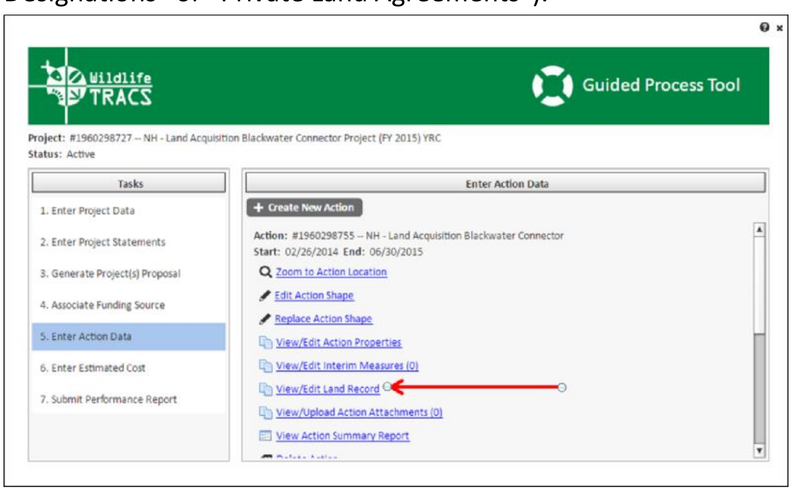
5. On the Action Categories tab fill out the Category and Strategy fields, then select the Activity (if applicable). Note: The strategy box **auto-populates** the measurement based on the action polygon (measurement is standardized to the U.S. measurement system with acres and feet only).



6. Continue entering the action data including the Habitat and/or Species tabs if applicable. Then click **Save** and **Close**.

7. On the Guided Process Tool, go to **Task 6: Enter Estimated Cost** and fill out the estimated costs. Note: This step is required before going back to fill out the Land Record form cost tab.

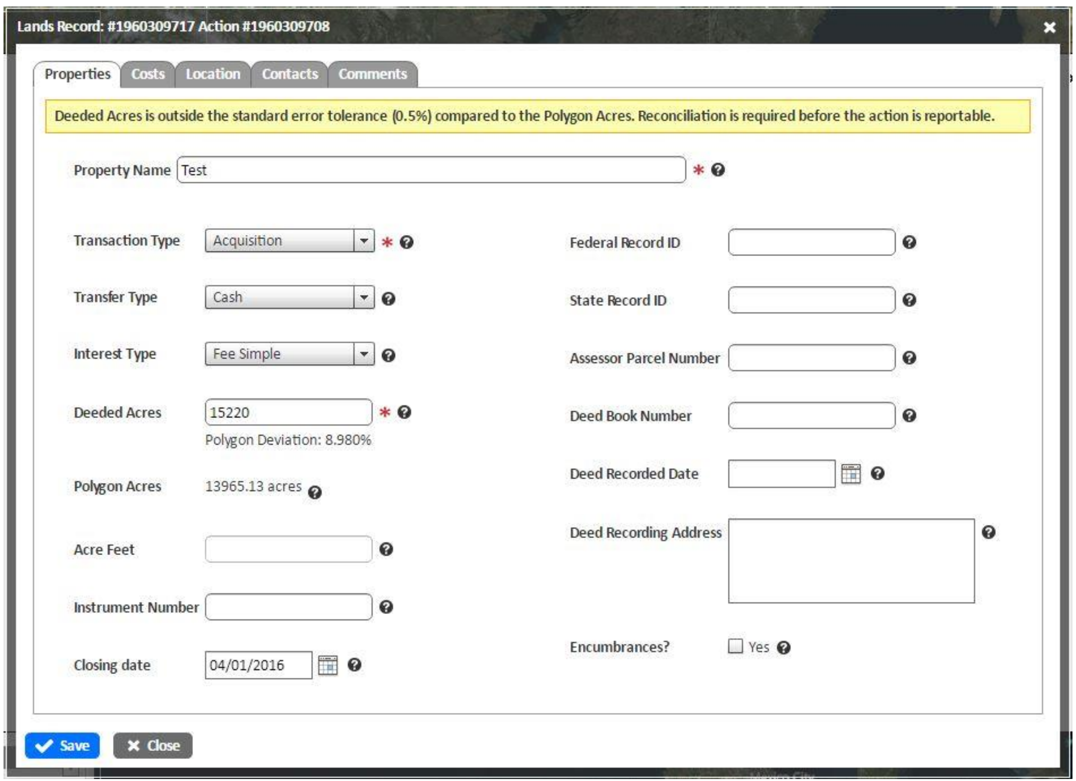
8. On the Guided Process Tool, go back to **Task 5: Enter Action Data** and select **View/Edit Land Record**. Note: The Land Record form is only available when the action strategy is selected as Land Acquisition or Water Rights Acquisition (it is not available for "Conservation Area Designations" or "Private Land Agreements").



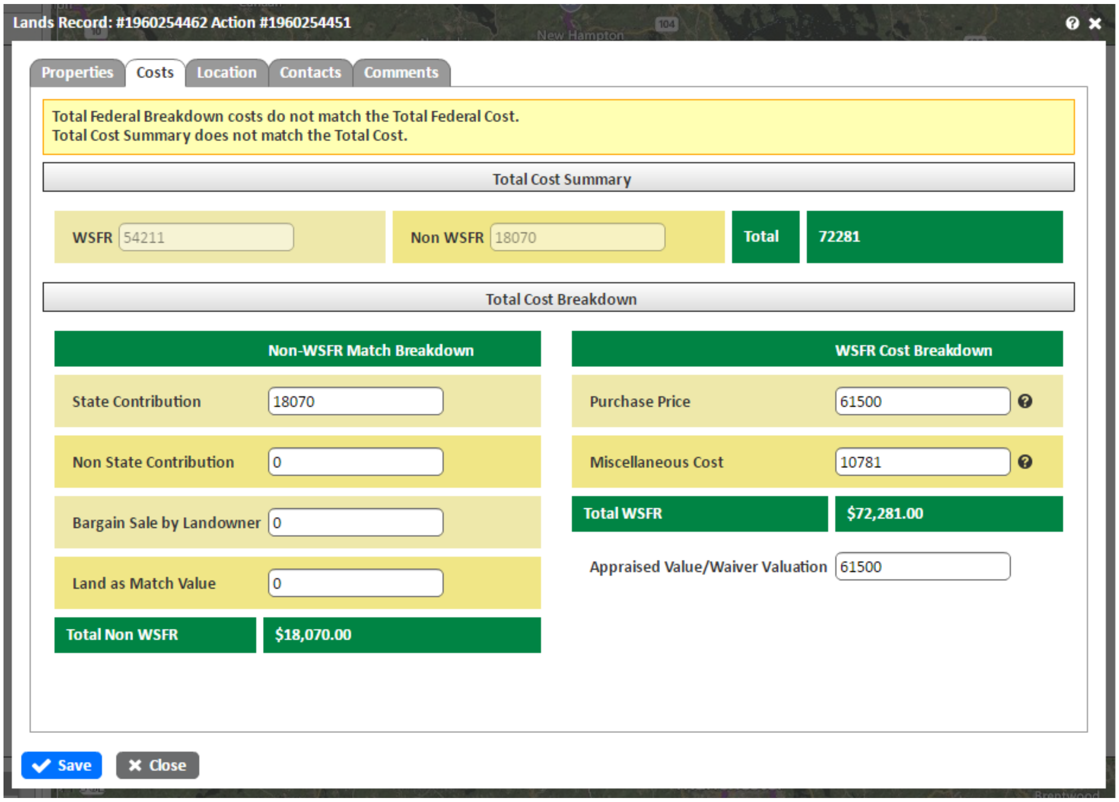
9. On the Land Record form, fill out all required fields and any additional fields that are applicable.

   Note: If the deeded acres do not match the action polygon acres, the polygon deviation displays below the deeded acres box and a yellow warning appears at the top of the page (indicating that the deeded acres are outside the standard error tolerance of 0.5% compared to polygon acres).

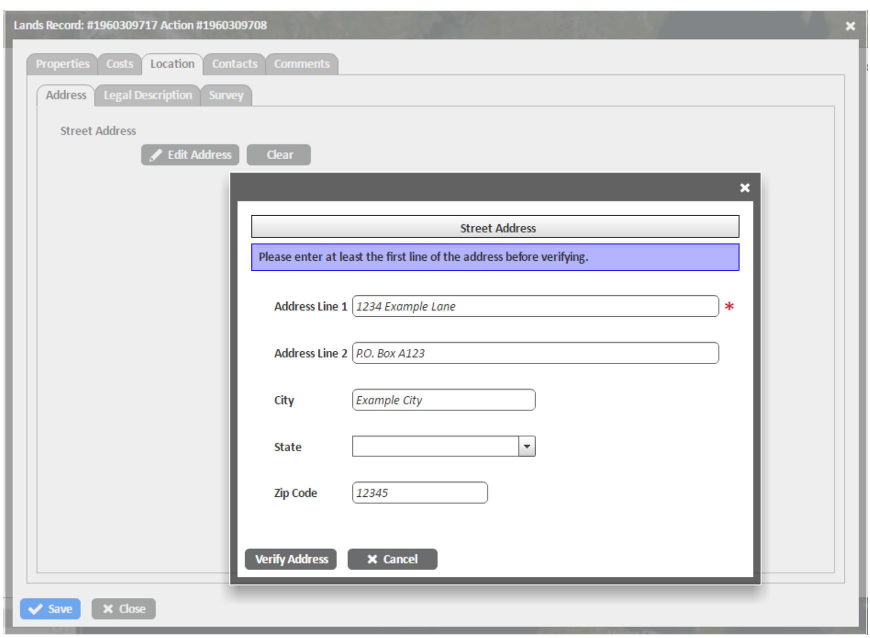
   While this only a warning message at this stage, the deeded acres or polygon needs to be corrected before the action is reportable. This displays as a red error message in the validation messages for the Final Performance Report.



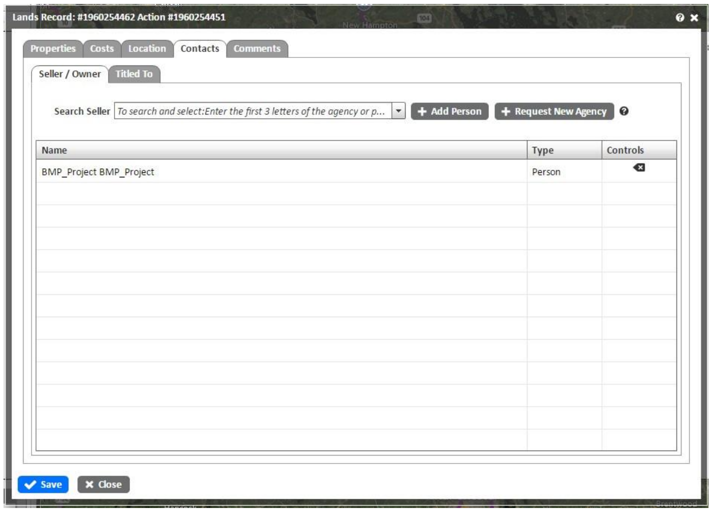
10. Fill out the Costs tab (note: the Estimated Costs on the Guided Process Tool must be filled out first before entering this section). Note: This form accepts $0 or blank amounts, however it should be filled out if possible.



11. Fill out the Address tab, Legal Description tab and Survey tab if applicable. Note: To enter a street address, click the **Edit Address** button and fill out the form, then click **Verify Address.** The system sends the address out for verification and returns results. If the address is not found, enter the address details in the comments section instead.

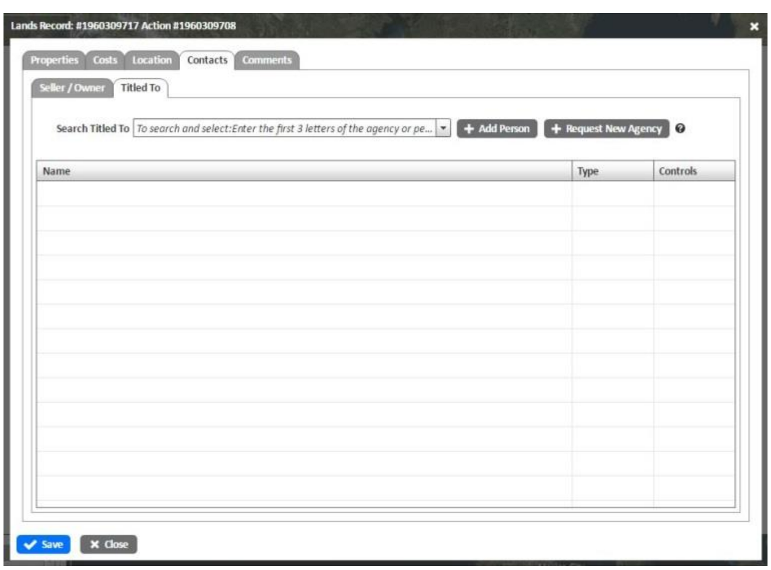


12. Fill out the Contacts tab if applicable. The **Seller/Owner** tab has a free text box allowing you to enter their name and contact information if available.



- The **Titled To** tab has a search box where you can enter the first three letters of the agency or person's name. The **Add Person** and **Request New Agency** buttons are available if needed.

  NOTE: For the purpose of TRACS, the "Title To" field should accurately reflect the name of the title holder on the land record so that we can query and display roll-up information. The Department of Fish and Game is typically the title holder, regardless of on whose behalf the land is purchased. In other words, select the agency listed in the title. For example if the title lists "Commonwealth of Massachusetts, acting by and through it's Department of Fish and Game", select "Massachusetts Department of Fish and Game". Then go to the Comments tab to enter the full title name if desired (e.g. "Commonwealth of Massachusetts, acting by and through it's Department of Fish and Game").



13. Fill out the Comments tab. The **Acquisition Purpose/Change in Purpose** tab is required. The purpose of the comment field is to specifically identify the purpose of an individual parcel. This information can be copied and pasted from the Project Statement Need field but may need to be further refined. The **Comments** tab can be used to store additional information (such as the full title name).

14. Click **Save** and **Close**

15. Back on the Guided Process Tool, attachments can be added at the action level to store documents (deeds, legal notices, legal descriptions, parcel maps, etc.) pertaining to the completed acquisition(s). TRACS can be used as place to store part of the permanent digital record.

Important Note: Any documents containing Personally Identifiable Information (PII) should NOT be uploaded to TRACS. Either PII information should be redacted, if it is to be stored in TRACS, or the sensitive documents should be stored as hard copy in the permanent administrative record. These documents will NOT automatically transmit to the WSFR Office. Hard copies of all land acquisition documents still need to be sent to the WSFR Regional Office to be maintained as part of the permanent administrative record. The hard copy records maintained by the Regional WSFR Offices are the official repository for land acquisition records.

Lesson 17: Revisions and Amendments

This chapter covers how to edit your project after it has been submitted for approval. This is important because once the project has been submitted for approval, most of the data cannot be edited unless you go through a revision or amendment process.

Once the **project statement/proposal** has gone through the approval workflow, most of the data in the project statement is no longer editable unless you go through the revision or amendment process.

Revision (Rescind Approval) vs. Amendment (New Draft) vs. Deviations:

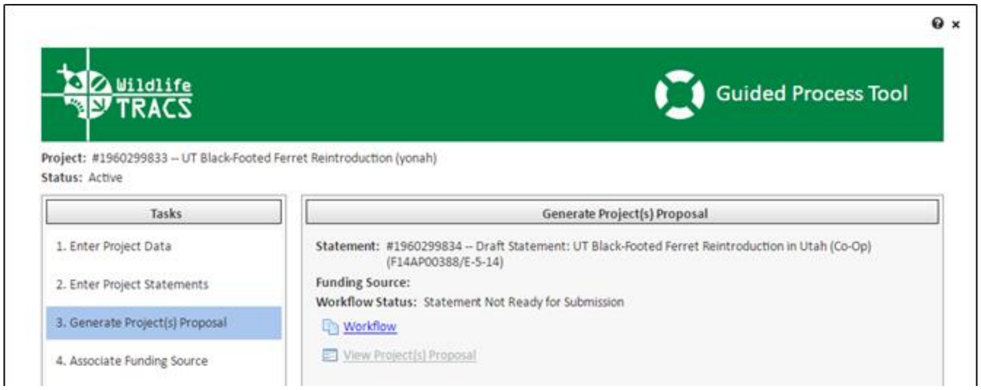
- A **revision** is used for **minor edits the original project proposal** during the approval process (the approval is rescinded, changes are made to the original project and it is sent back through the approval workflow).
- If a project was entered into TRACS and has a formal grant amendment afterwards, then the **amendment** needs to be entered into TRACS as a new draft.
    - **Important Note:** Enter the project in its current version. In other words, if the original project (un-amended) was already entered into TRACS, then enter an amendment as a New Draft and send it back through the approval process. If the original project was not entered into TRACS, you do NOT need to enter both versions into TRACS; instead simply enter the current version.
- If a revision or amendment was not needed and there are changes or deviations in the work that was reported, these are documented in the **Significant Deviations** on the results form for the action.
- **Note:** If the Final Performance Report has been submitted for review or approval, much of the data in the project is no longer editable unless the federal approver selects "Do Not Approve" or rescinds the approval of the final report. They may need to rescind approval on both the Performance Report workflow and Project Proposal workflow forms.

Revision (Rescind Approval)

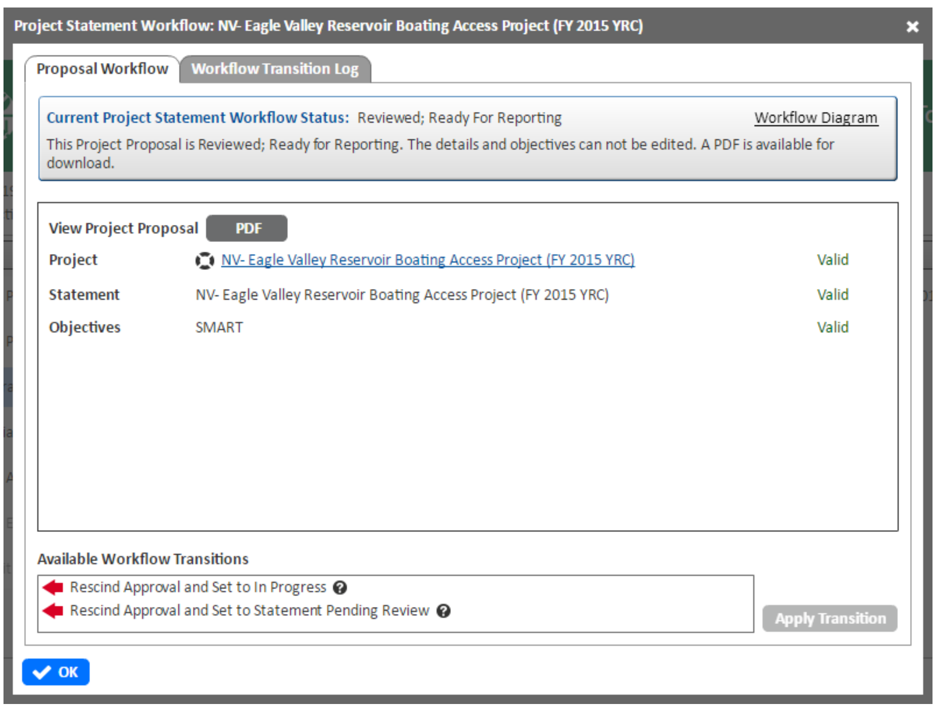
A revision is a change to the original project proposal that will be sent back through the approval process. An approved project cannot be edited or deleted until the approval has been rescinded.

Contact your federal approver to rescind the approval. The approvers will need to open the project, either through the workflow manager or by searching for the project using the Guided Process Tool (see steps below).

From the Guided Process Tool, select “3. Generate Project Proposal” in the left pane, and click the “Workflow” link on the right.



In the available workflow actions, the federal approver will need to select **Do Not Approve** and click the **Apply Transition** button. The federal or state approver will then need to select **Rescind Approval** (either set it back to “In Progress” or “Pending Review”) and click **Apply Transition**. Note: Setting the project back to “In Progress” allows the state users to edit the project, whereas setting the project back to “Pending Review” allows the federal user to edit the project.



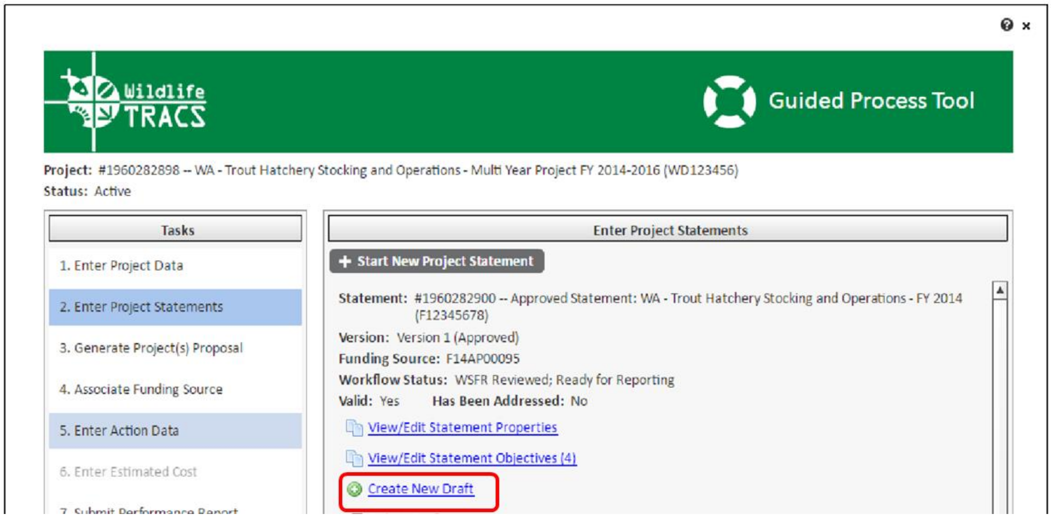
Make any changes or edits to the project. Once the project has been edited, send it back through the approval workflow.

Amendment (New Draft)

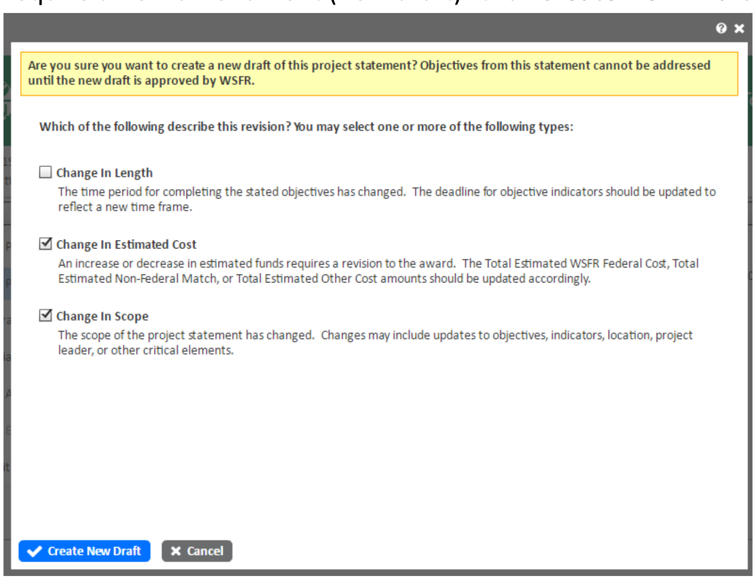
Once the project has gone through the approval workflow, it will have a status of "Reviewed Ready for Reporting".

1. To create an amendment, open the Guided Process Tool to **Step 2 Enter Project Statements** and select **Create New Draft** on the right side.

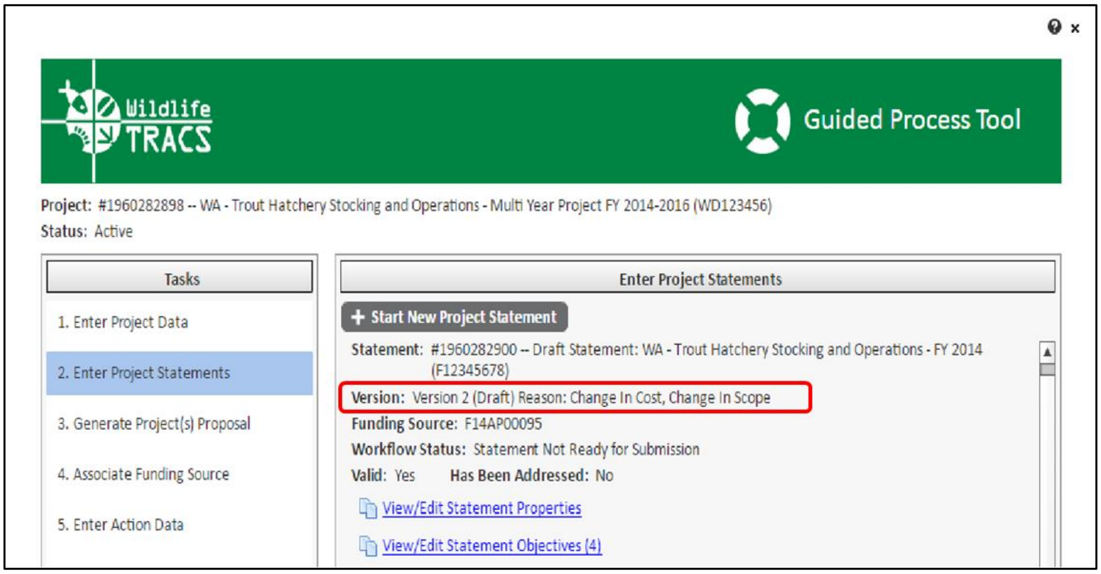
   Important Tip: If the Create New Draft button is grayed out, check that the project status is active and check that the Funding Source is associated with the project!



2. Select the reason for the amendment by checking the box by Change in Length, Change in Estimated Cost and/or Change in Scope. NOTE: A change in estimated cost alone does not require a new amendment (new draft). Click **Create New Draft**.



3. Make any necessary changes and save. (Tip: Additional information about the amendment can be documented on the Scope Deviations tab on the Project Statement form).The new draft version will replace the original version. The new draft is a copy of the original project statement, with the version number and reason listed on the right side.



4. The New Draft will need to be sent through the approval workflow again. Once approved, the new draft will be the approved version and the old version will be archived behind the scenes.

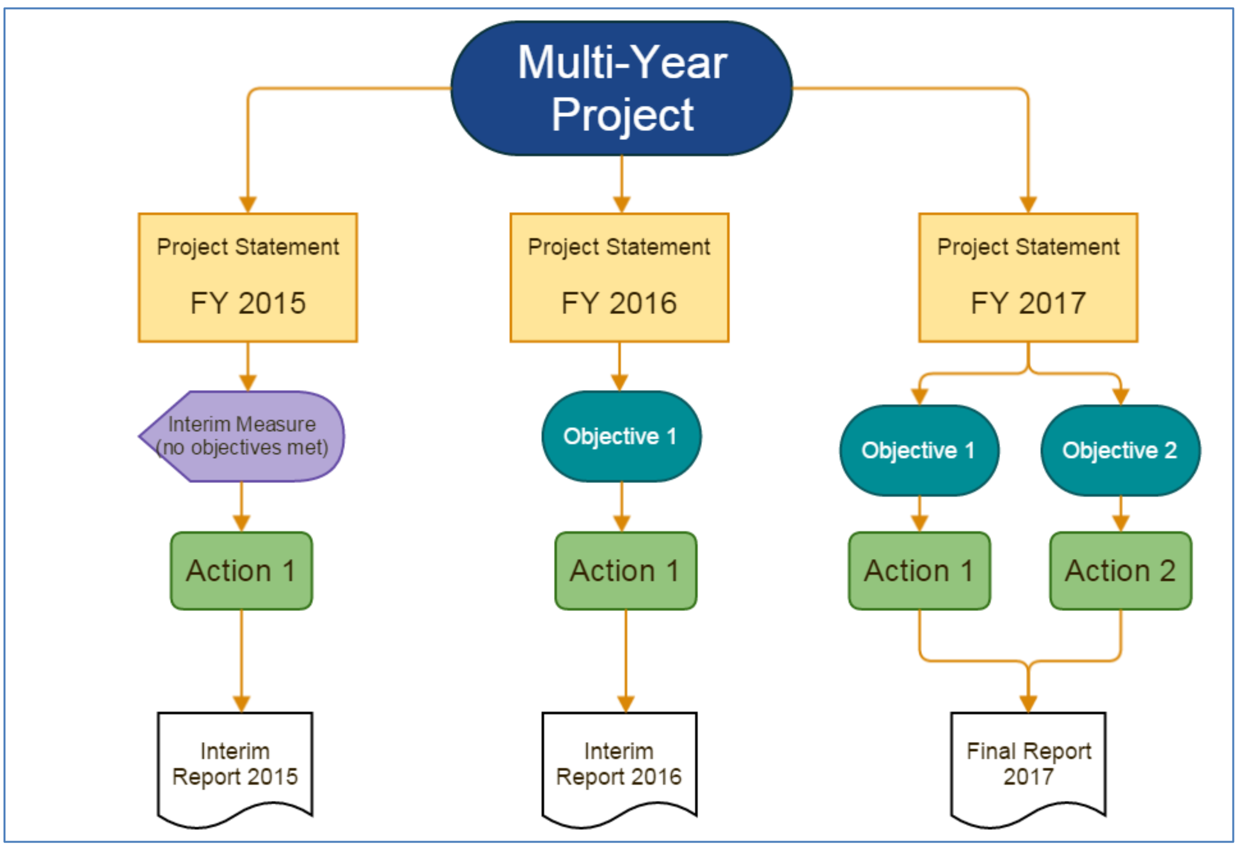
Lesson 18: Interim Measures

This chapter covers how to create interim measures in TRACS.

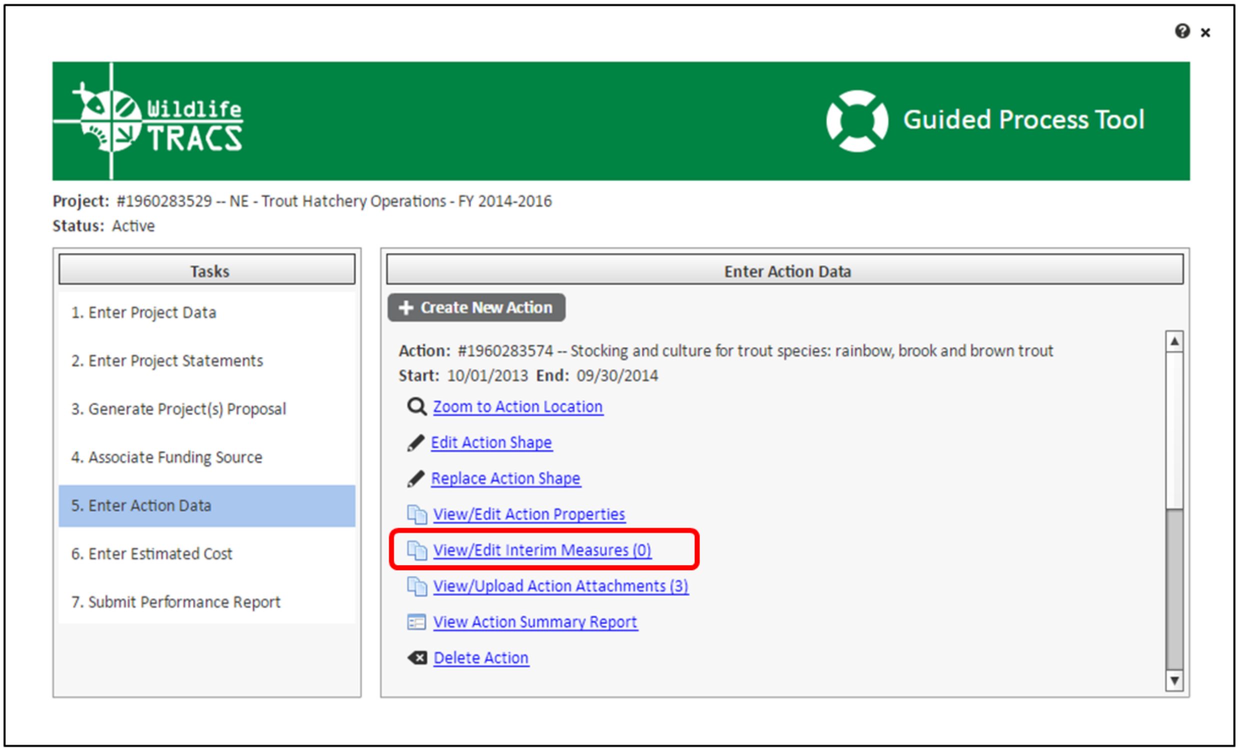
Important Note: Interim Measures are optional and rarely (if ever) used. They do not display on Interim or Final Reports (and will be removed from future versions of TRACS). If unplanned actions occur, we recommend that you do not use Interim Measures; instead amend or revise the original objectives as needed to report new actions.

An interim is used to document work that does not directly address the primary objectives but demonstrates progress towards completion the project (in other words, an unplanned action).

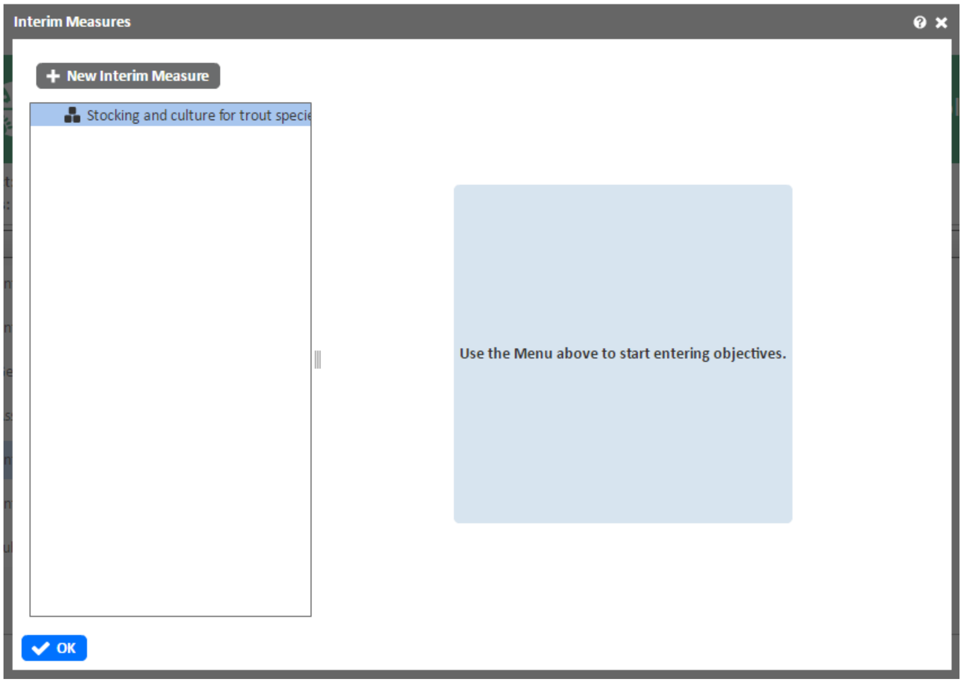
Interim Measures are typically created during multi-year projects. Note: Interim Measures are not related to interim reports.



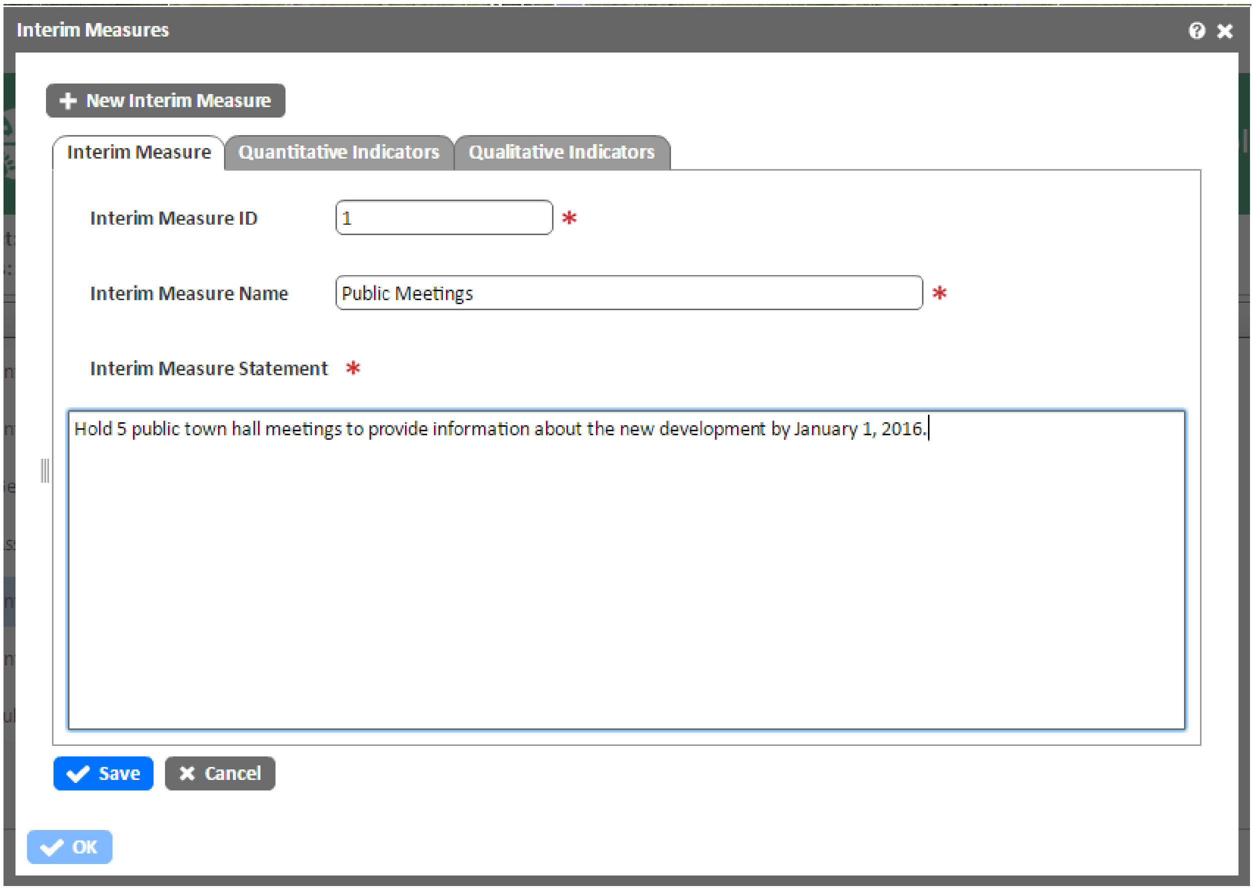
1. The Action will need to be created first. Then, select the View/Edit Interim Measures link in the right pane (Guided Process Tool Step 5: Enter Action Data).



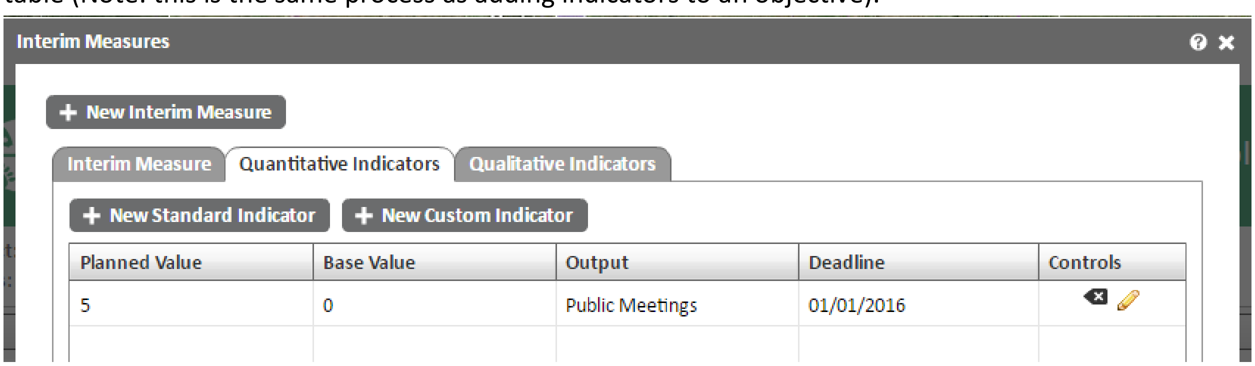
2. In the Interim Measures window, click the **New Interim Measure** button.



3. Enter the Interim Measure ID, Interim Measure Name, and Interim Measure Statement fields on the first tab.

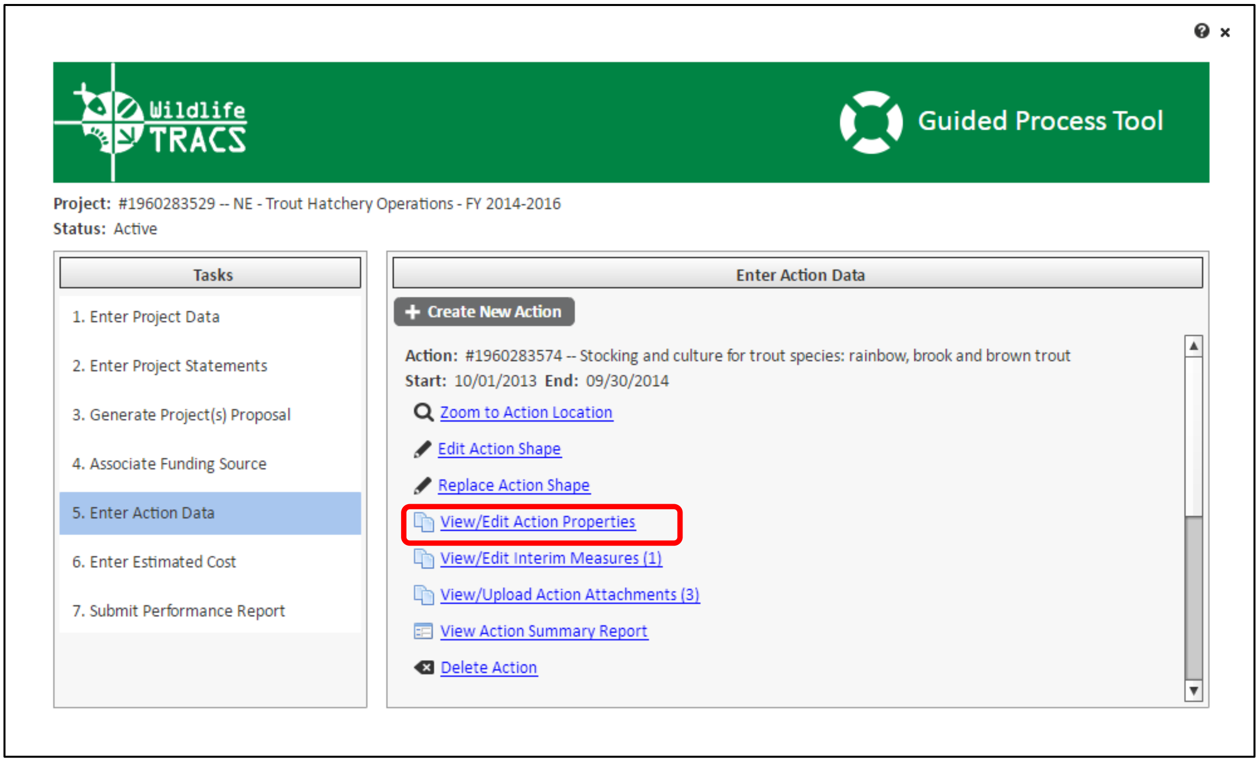


4. Fill out the appropriate indicator tab (qualitative or quantitative) and add the indicator(s) to the table (Note: this is the same process as adding indicators to an objective).

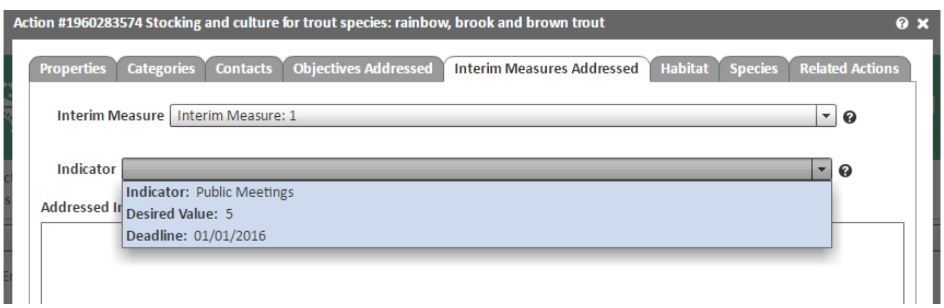


5. Click **Save** and **Close**.

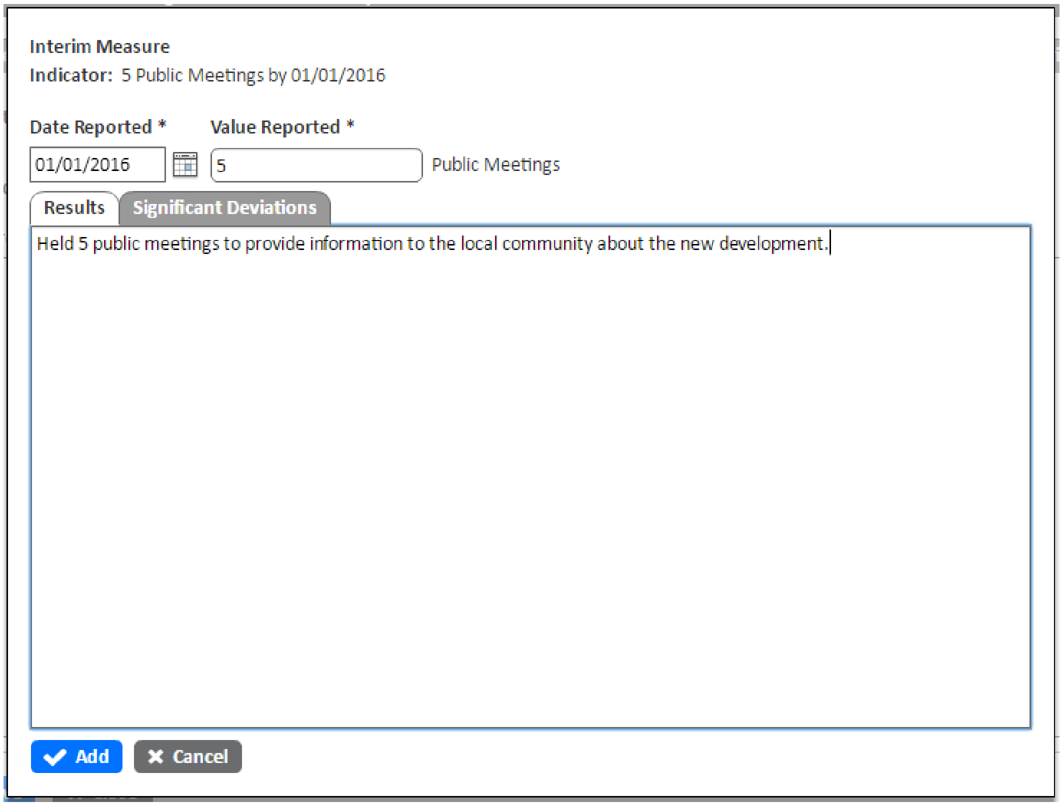
6. Click on View/Edit Action Properties.



7. On the Interim Measures tab:
   - Select a **Project Statement** from the drop down list
   - Select an **Objective** from the drop down list
   - Select an **Indicator** from the drop down list



8. When the pop-up window appears, complete:
   - **Date Reported**
   - **Value Reported** (use **Copy Strategy Value** button on right to copy the value originally entered in the objectives)
   - **Results:** enter narrative of results
   - If an empty box appears on the right, select "True" or "False" from the drop down (appears with qualitative indicators only and is used to determine if the objective was completed)
   - Click over to the **Significant Deviations Tab** to add items, if necessary.
   - Click the **Add** button to add the progress report.



9. Click the **Save** button to save the **Action** form. Click the **OK** button to confirm.

Lesson 19: Profile and Help Desk

This chapter covers how to change or update your profile information in TRACs and how to submit a Help Desk ticket in TRACS.

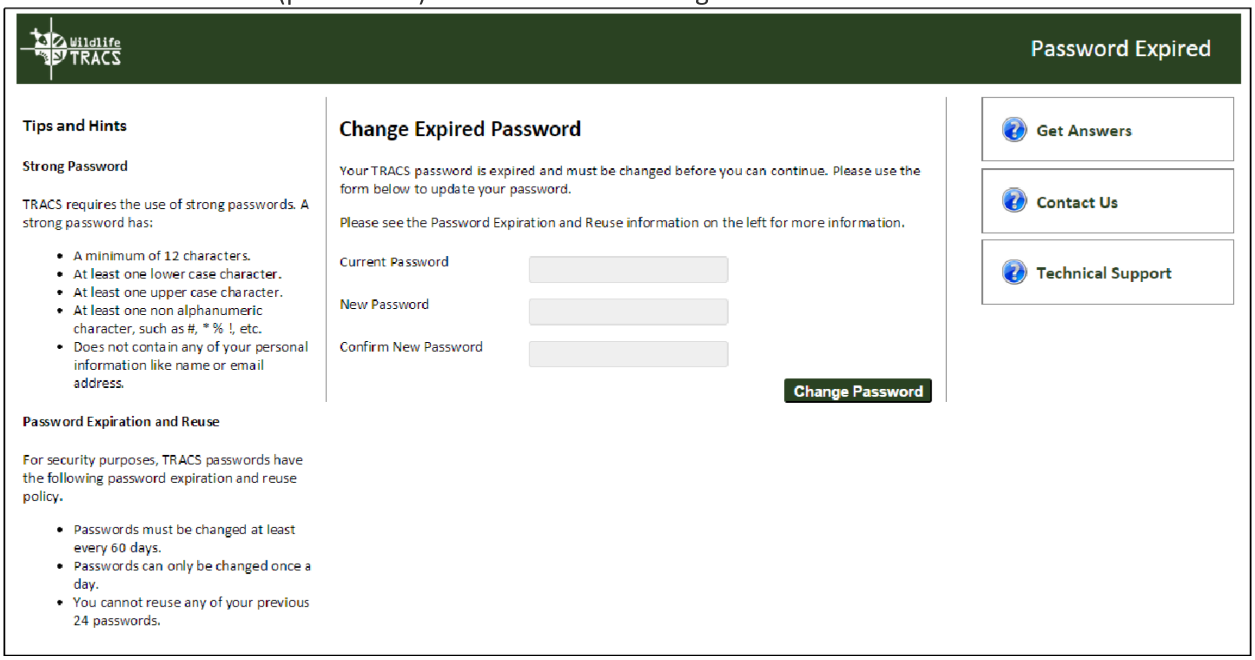
Go to the sub-chapters for more information:

- Updating your Profile and Password
- Using the Help Desk Link

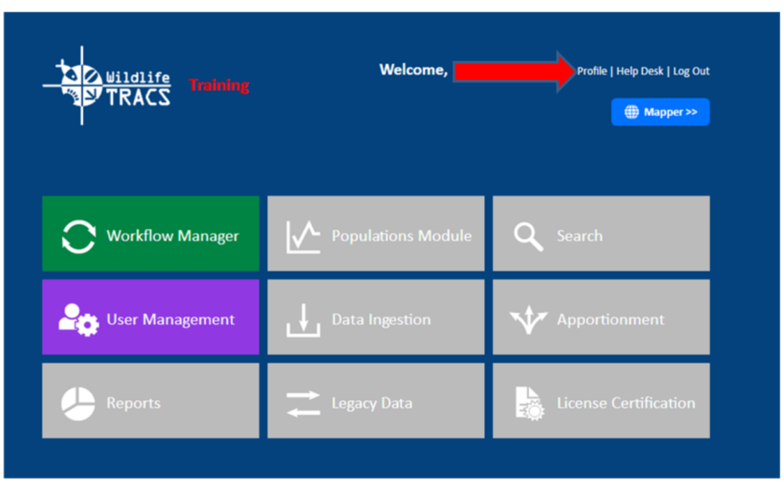
Updating you Profile and Password

For security purposes, TRACS passwords have the following password expiration and reuse policy:

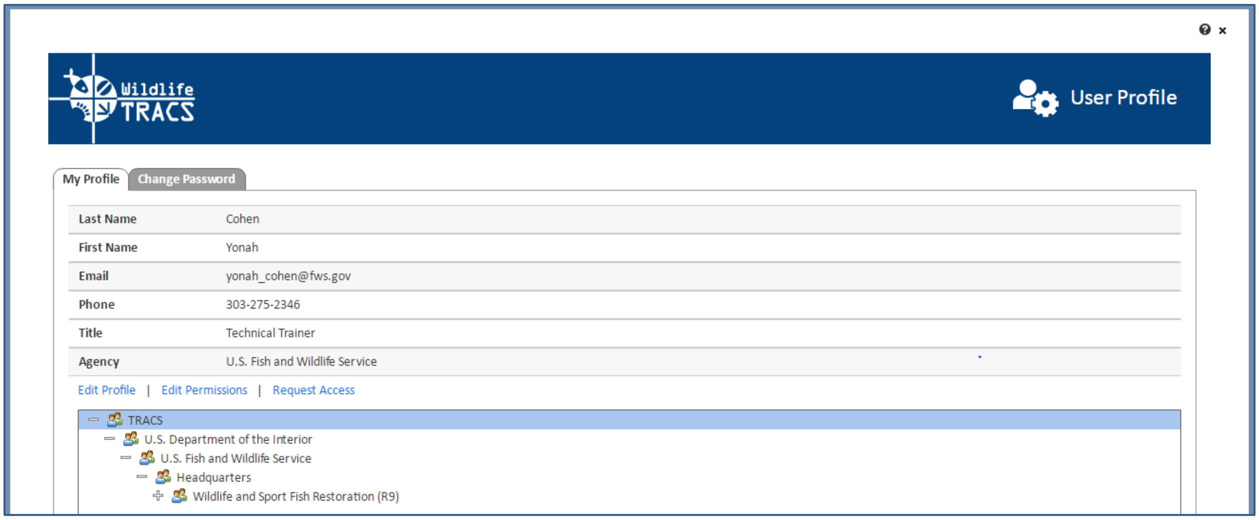
16. Passwords must be changed at least every 60 days. Passwords can only be changed once a day.
17. You cannot reuse any of your previous 24 passwords.
18. If 60 days or more has passed since your password has been changed, you will be prompted to create a new password the next time you try to log in to the TRACS site. This will occur for both the TRACS live (production) site and TRACS training site.



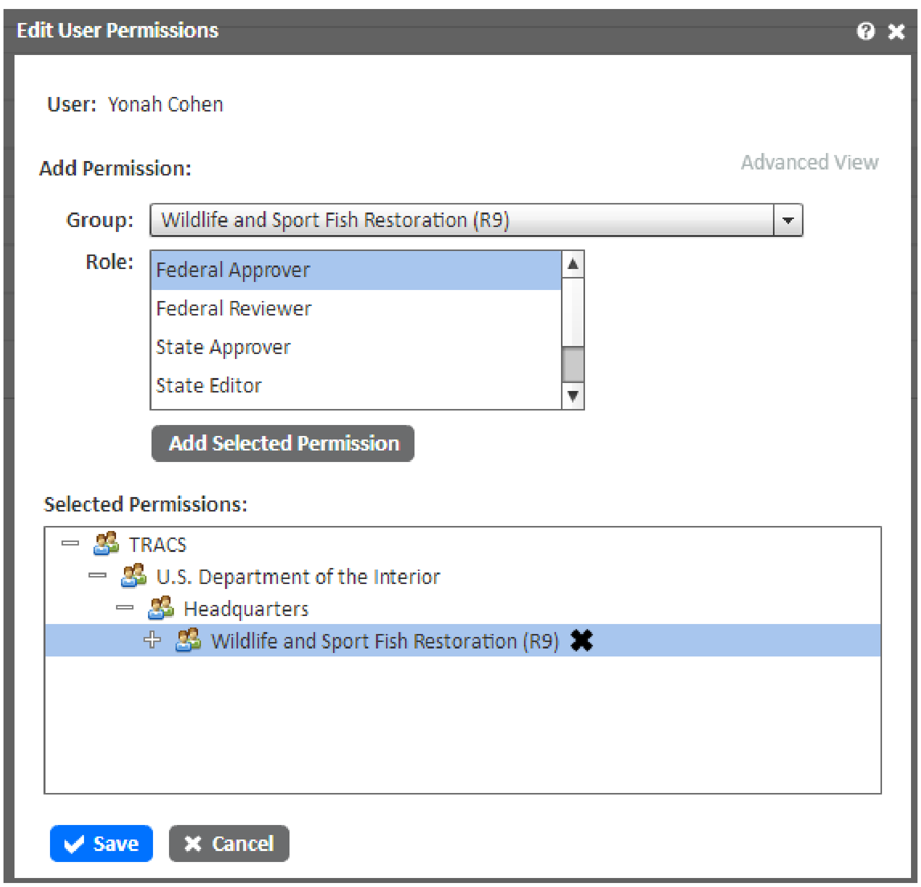
Users can update their own profile, request additional permissions and reset their passwords using the TRACS Dashboard **Profile** tool. A current password is required and the user account must be active. Select the **Profile** link located to the right of your username at the top of the screen.



On the **My Profile** tab, you can view your own profile information including name, phone, title, and agency. Click the **Edit Profile** link to update this information. You user role and permissions are displayed in the box on the lower half of the screen. Select the **+** sign to expand the view.

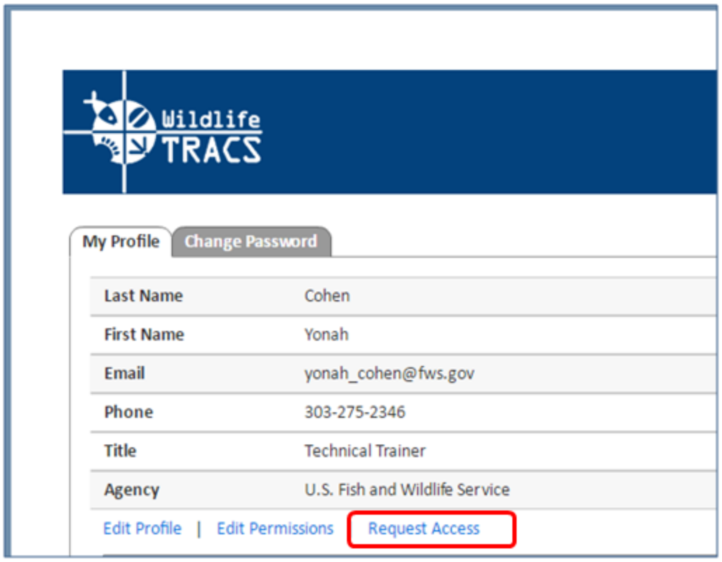


User Administrators Only: From the **My Profile** tab, click the **Edit Permissions** link to select additional permission for your assigned group (e.g., State Editor, State Reviewer, State Approver, Federal Reviewer, Federal Approver). Click **Add Selected Permission**.

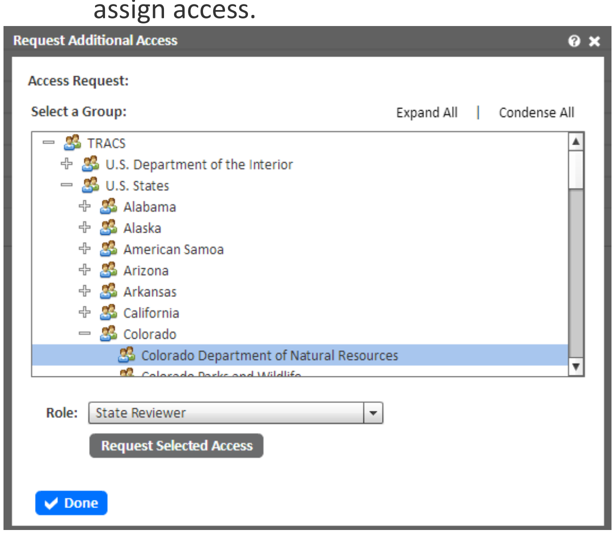


To Request Additional Access:

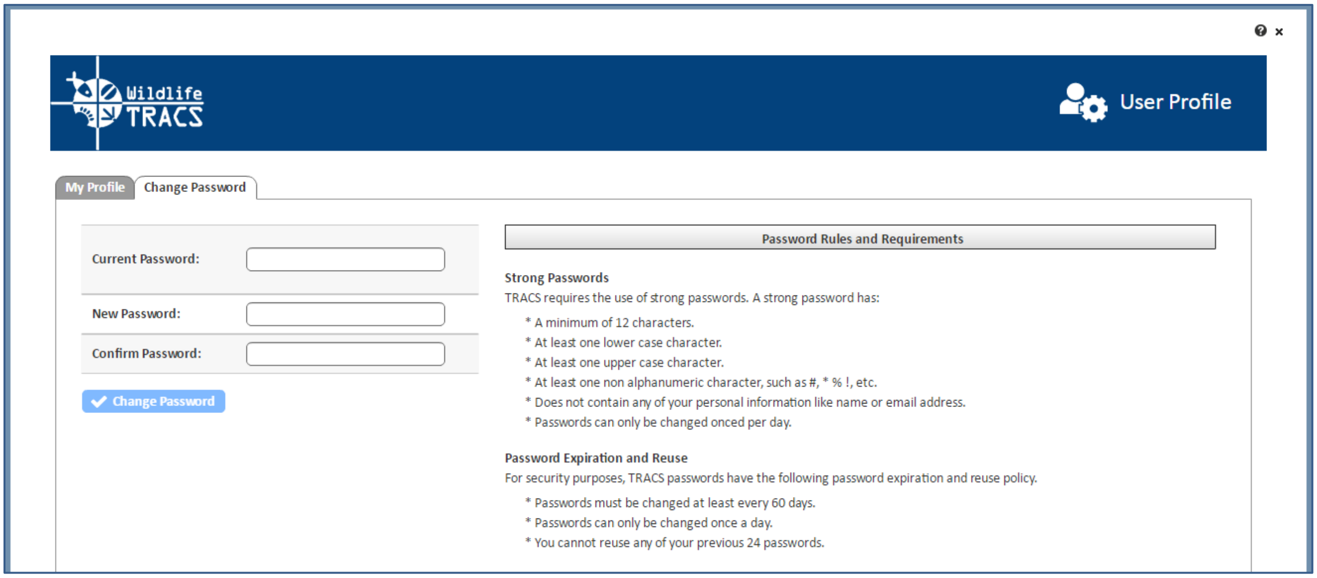
- From the **My Profile** tab, click the **Request Access** link.



- In the select a group window, click the + sign by TRACS and each submenu (or click Expand All) and select your group.
- Then select the role you need from the drop down menu.
- Click **Request Selected Access** and **Done**. The User Administrator will review the request and assign access.



To update your password, select the **Change Password** tab, enter your current password, new password and confirm your password. Select the **Change Password** button.



<u>The requirement for passwords is set by DOI policy:</u> Policy requires a 15 minute lockout after 5 failed attempts to enter a password. We recommend waiting 20 minutes because the 15 minute lockout period resets if another failed attempt occurs during the lockout period.

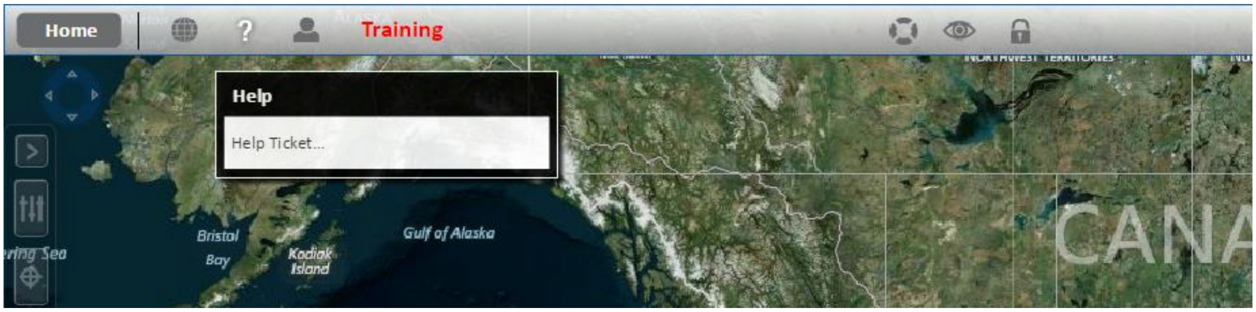
Passwords can only be reset once within a 24 hour period. This requirement can be overridden by modifying the password directly in the database; however, this requires assistance from the Help Desk. Passwords must be changed every 60 days and must be unique compared to the previous 24 passwords used. Any change to a password constitutes a unique password (i.e. changing a single character or digit constitutes a new unique password).

Using the Help Desk Link

The Help Desk link is available directly in TRACS in two places: on the home page that first opens after logging into TRACS and on the top toolbar on the mapper. The Help Desk link allows you to submit a help desk request to the TRACS support team. You can also contact the Help Desk via email at tracs-helpdesk@fws.gov or by phone at 1-844-408-7227 (1-844-40-TRACS).

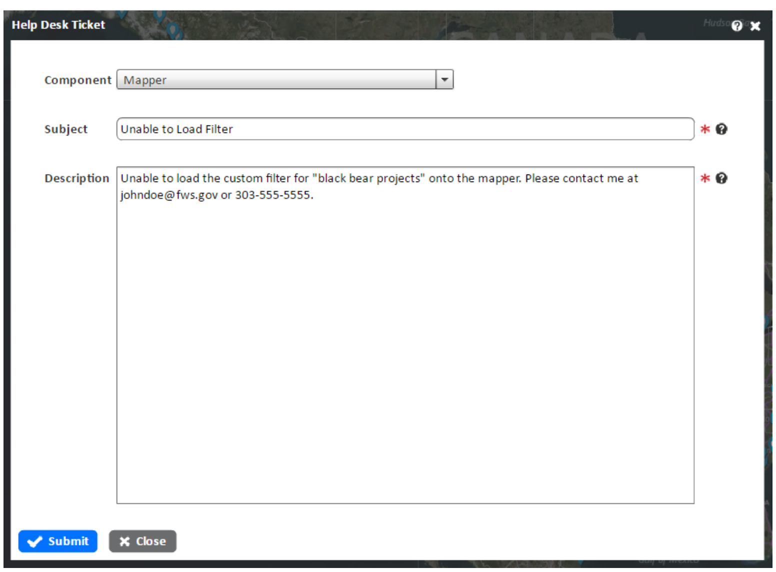
From the Home Page, click on the Help Desk Link.

From the Mapper Toolbar, click on the Help Desk icon:



Fill out the Help Desk Ticket form:

- **Component:** This field is required. Select the component or part of TRACS that is affected. (Make your best guess, for example if an error message appears on the mapper, select "Mapper" as the component.)
- **Subject:** enter a short subject for your help desk ticket
- **Description:** enter as much information as possible, including a detailed description of the issue, the affected project names/numbers, your name and contact information. This will help shorten the response time from the help desk and reduce follow-up emails or calls.
- Click **Submit** to send the help desk ticket to the TRACS team.



Note: The TRACS help desk and technical support team cannot address local IT infrastructure issues. Please direct questions about your computer, network, or bandwidth settings to your local IT staff.

Lesson 20: Workflow Manager

This chapter covers how to use the Workflow Manager, which is used primarily by advanced users to view and manage multiple projects and reports from one location. This tool allows you to get a big picture of the projects and reports you are responsible for in TRACS.

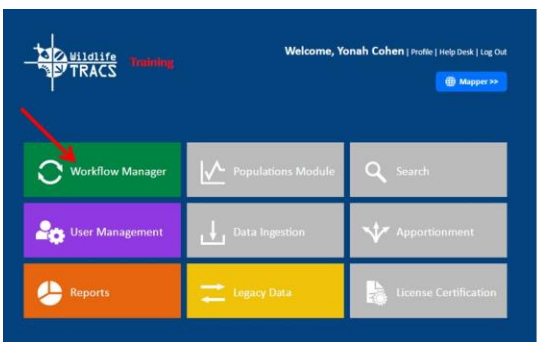
The Workflow Manager does not replace the Guided Process Tool; it is more of a tool for the *management* of projects and reports.

The Workflow Manager has two main functions:

1. **View and Manage Multiple Projects:** The Workflow Manager is used to manage the project proposal and performance report workflows for one or more projects.
    - The filter-based search tools allow you to pull up a list of projects in various stages of review and approval for your group (e.g. agency or region).
    - You can use the "Manage" tool to send one or more projects through the workflow for review and approval. The Workflow Manager is typically used by users who need to manage multiple projects at a time. **Note:** Users can still complete the same workflow steps for an individual project directly from the Guided Process Tool on the mapper.
    - Go the next sub-chapters for more information about managing projects on the Project Proposal Workflow Tab and Performance Report Workflow Tab.
2. **Pull an Interim Report:** The Workflow Manager is the only place users can generate Interim Reports. For more information about generating an Interim Report, visit the Interim Reports sub-chapter.

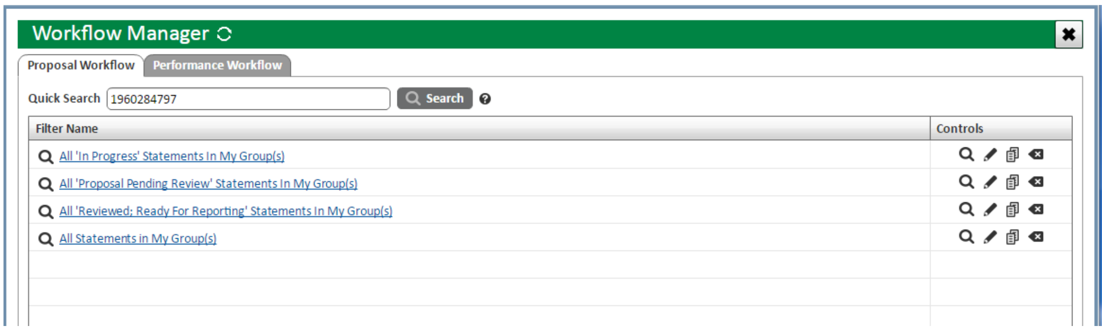
How to access the Workflow Manager:

Log in to TRACS and select the **Workflow Manager** icon from the Dashboard.



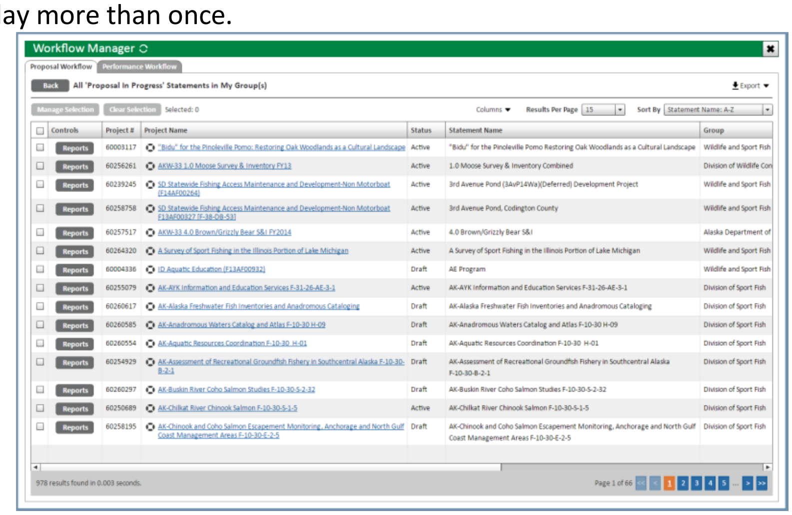
Project Proposal Workflow Tab

<u>To search for an individual project:</u>
Use the “Quick Search” bar on the Proposal tab to lookup a project by name or number. Tip: Searching by project name will pull up search results including “exact” matches and “similar” matches. To pull up the exact project, search using the Project TRACS ID number or Project Statement TRACS ID number.



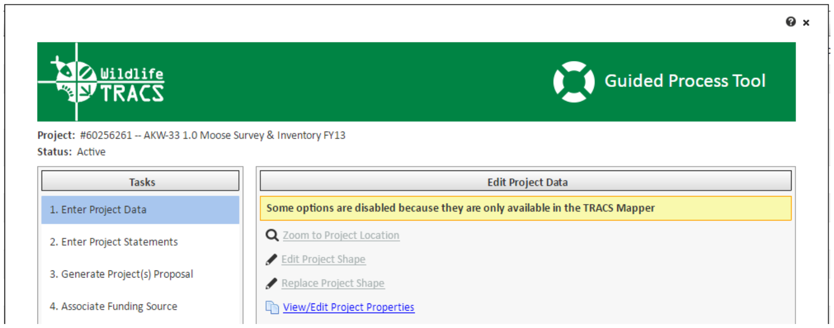
<u>To pull a filtered list of Project Proposals:</u>

- On the **Proposal Workflow** tab, there is a list of standard filters that you can choose from such as “All Proposal In Progress Statements in My Group(s)”. Click on a filter to open it.
- There is also the option to select **New Filter** (at the bottom left), which is covered in the sub-chapter on **Creating Filters for Workflow Manager**.
- The results page will display with each ***project statement*** listed per row. Customize the results page:
  - Check in the lower right corner of the window to see if the search has produced multiple pages.
  - The window can be customized by the **columns** displayed, **results per page**, and **sorted by** fields in the upper right.
  - The **Export** button allows you to download an Excel spreadsheet displaying “All Columns” or “Visible Columns”. Note that the “visible columns” option will download only the columns you have selected, but for ALL of the pages of results.
  - The rows indicate individual project statements, so projects that have multiple statements will display more than once.



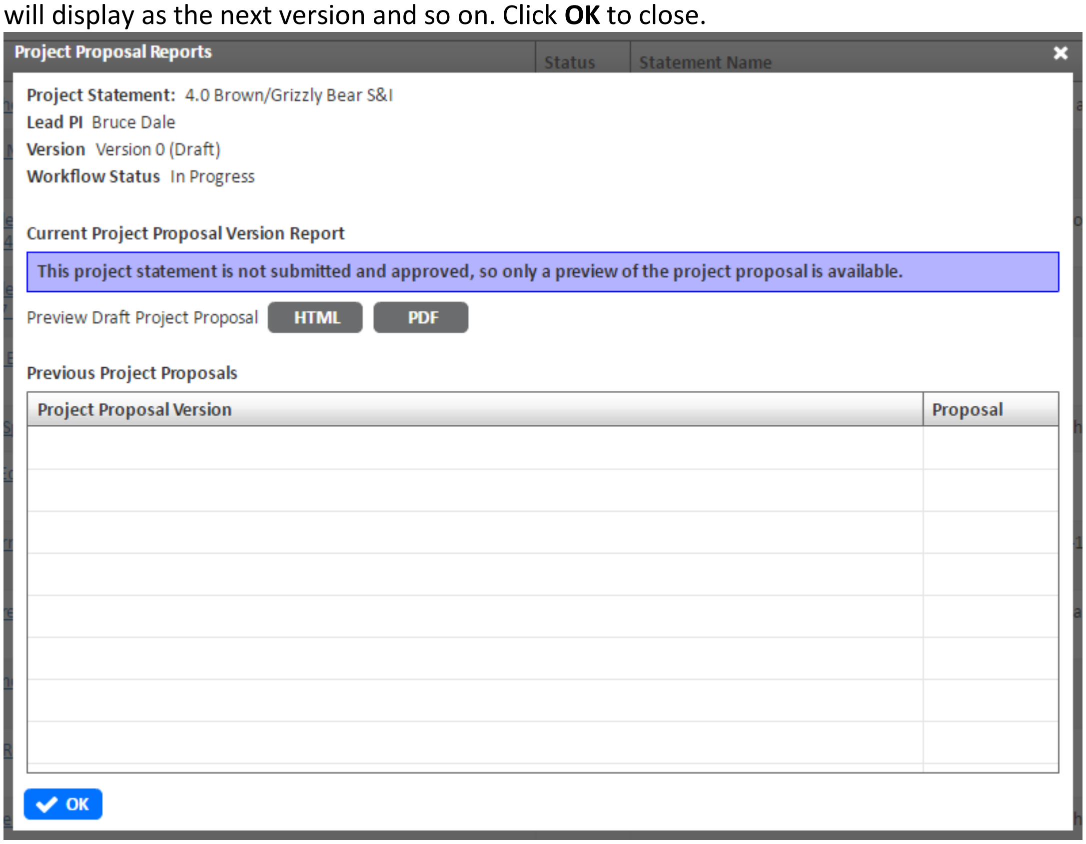
To open an individual project:

- Click on the hyperlinked name, which will open the Guided Process Tool.
- A yellow warning indicates that some options are disabled because they are only available in the TRACS mapper.
- Make any necessary changes and then click the X in the upper right to close the window.



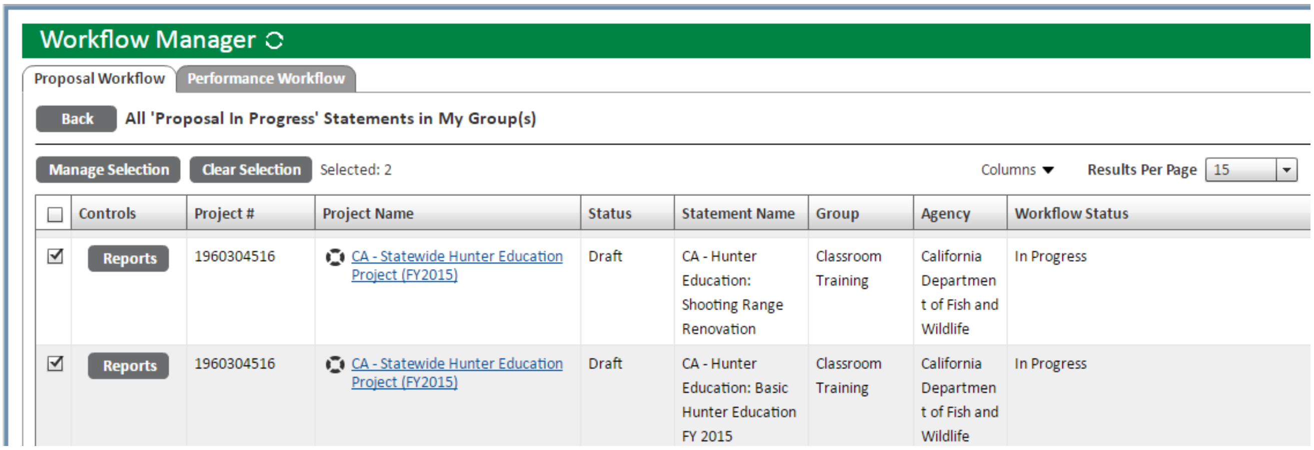
To view or download the Proposal:

- Click on the **Reports** button to the right of a project to open a window where you can download a copy of the Project Proposal in either **HTML** or **PDF** formats (note: Once the proposal has been approved only the PDF is available).
- If the proposal has been approved, it will display in the Project Proposal Version box. Version 1 indicates the original approved version of the proposal. If the proposal has an amendment, it will display as the next version and so on. Click **OK** to close.



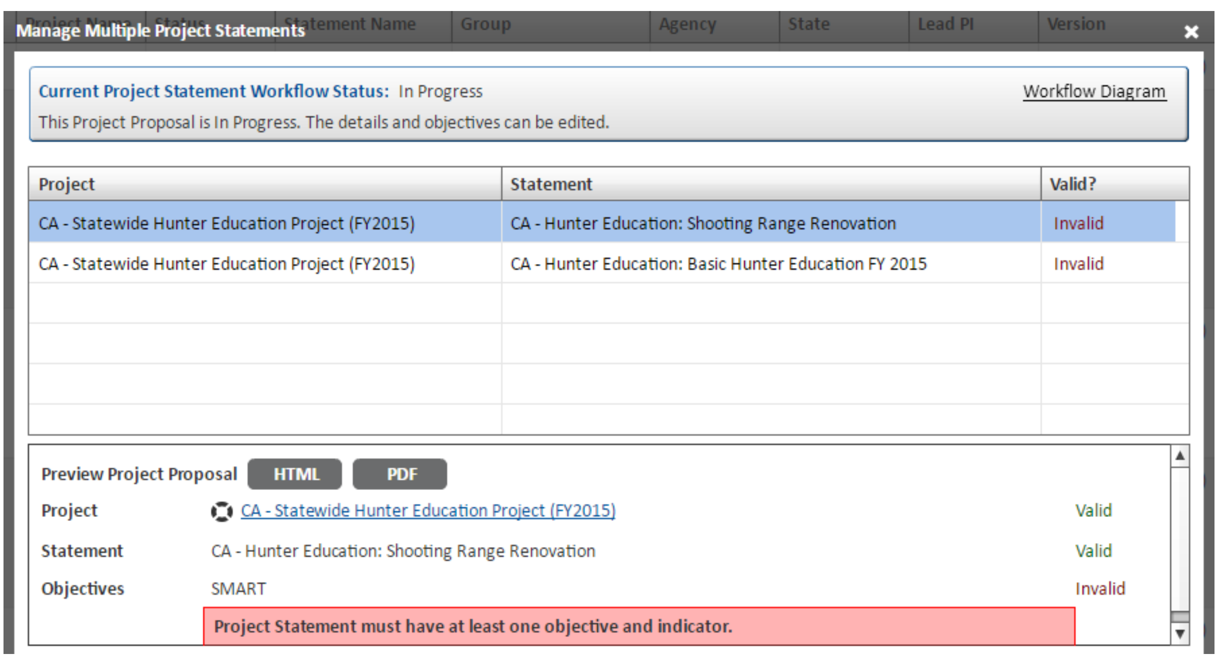
To send one or more projects through the workflow:

- Check the box to the left of each project and click the **Manage Selection** button above. (Use the **Clear Selection** button to uncheck all boxes). Note: In order to manage multiple proposals, they all must have the same workflow status and meet all the validation rules.



- This will open the same workflow form available by going through the mapper to open the Guided Process Tool. You can use the Workflow Manager **or** the Guided Process Tool to send the project through the workflow steps.

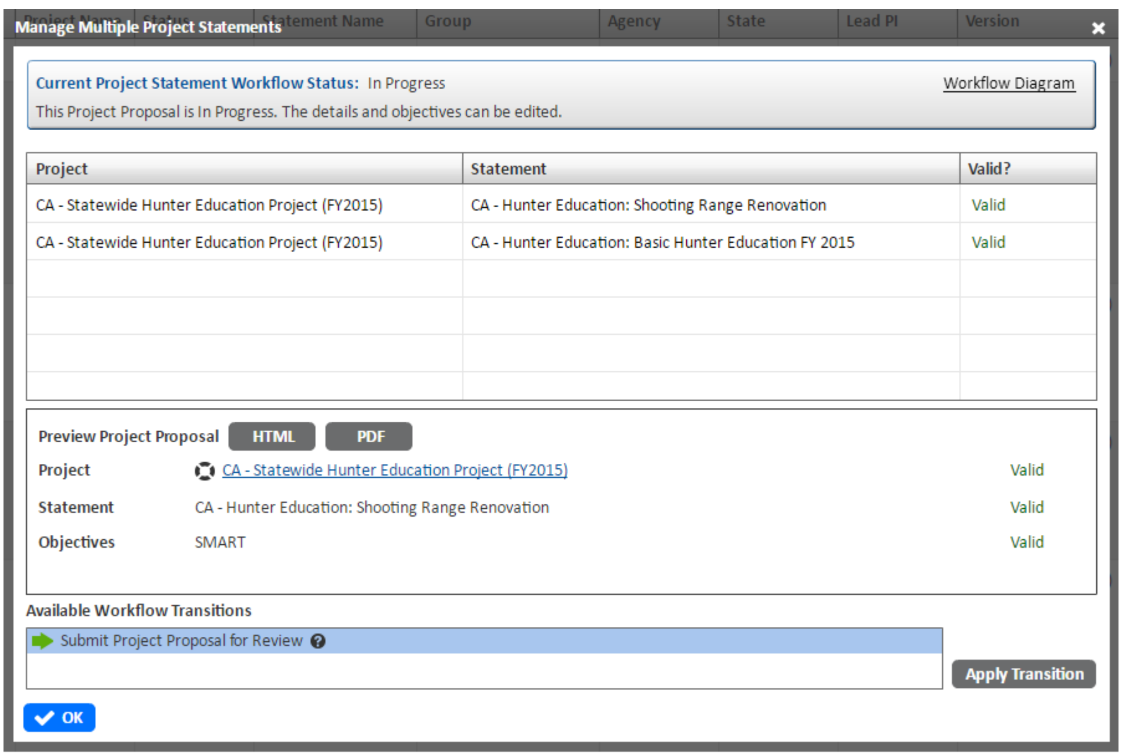
- Validation information will appear at the top (select a project to view details in the lower half of the screen). If there is missing information it will appear in a red "Error" message. Errors must be fixed before proceeding, whereas "Warnings" which appear in yellow are information and be bypassed.



- Select the desired workflow process and click **Apply Transition**.

- The proposal begins with a status of "**In Progress**". The editor (state or federal) will need to select "**Submit Project Proposal for Review**" and apply the transition to change the status to "**Pending Review**".
- The federal reviewer will have the option to select "**Approve Proposal**" or "**Do Not Approve Proposal**". Once the project is approved, the status will display as "Reviewed Ready for Reporting".
- If the data needs to be edited after the proposal has been approved, contact the federal reviewer to rescind approval. The federal reviewer can "**Rescind Approval and Set to In Progress**" which allows the state editor to make any changes and submit the project for approval again. The other option to "**Rescind Approval and Set to Statement Pending Review**" allows the federal reviewer to make changes.

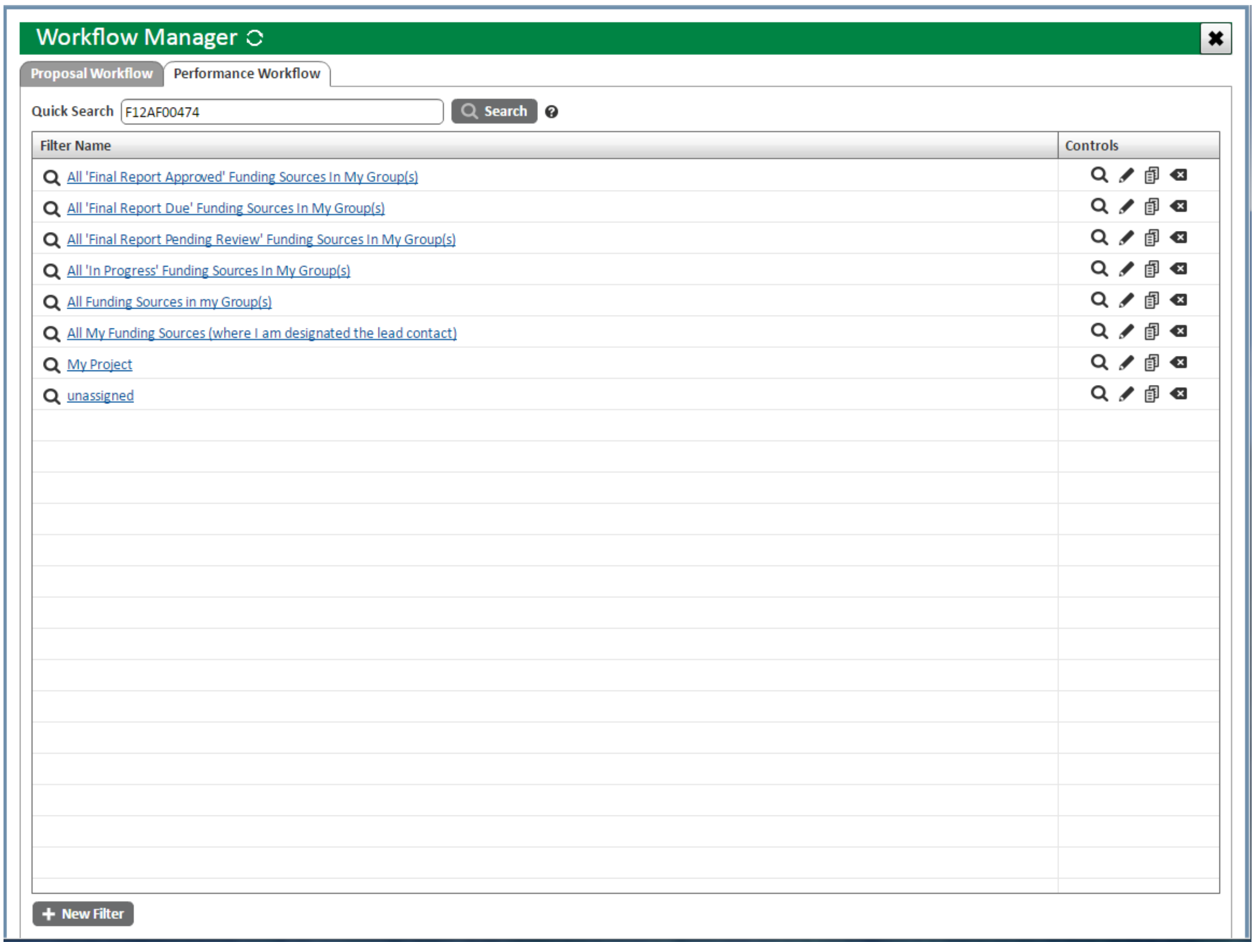
- Note: The system does not currently send automatic notifications, so you will need to follow-up with the reviewer to let them know when the final report is pending their review. Likewise, the federal reviewer should contact the editor when the proposal is approved or if any revisions are needed.
- Click **OK** to close the window.



Performance Report Workflow Tab

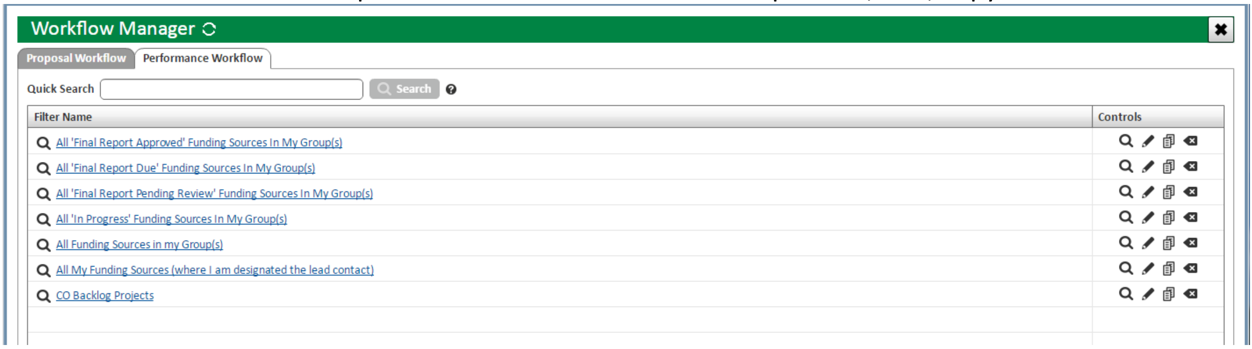
<u>To search for an individual funding source:</u>
The Performance Workflow tab is organized by funding source.

- Use the "Quick Search" bar on the Performance Workflow tab to lookup a funding source by name or number. Tip: Searching by project name will pull up search results including "exact" matches and "similar" matches.
- To pull up the exact funding source, search using the Award Number or Project TRACS ID number.
- There is also the option to select New Filter (at the bottom left), which is covered in the sub-chapter on **Filters for the Workflow Manager**.

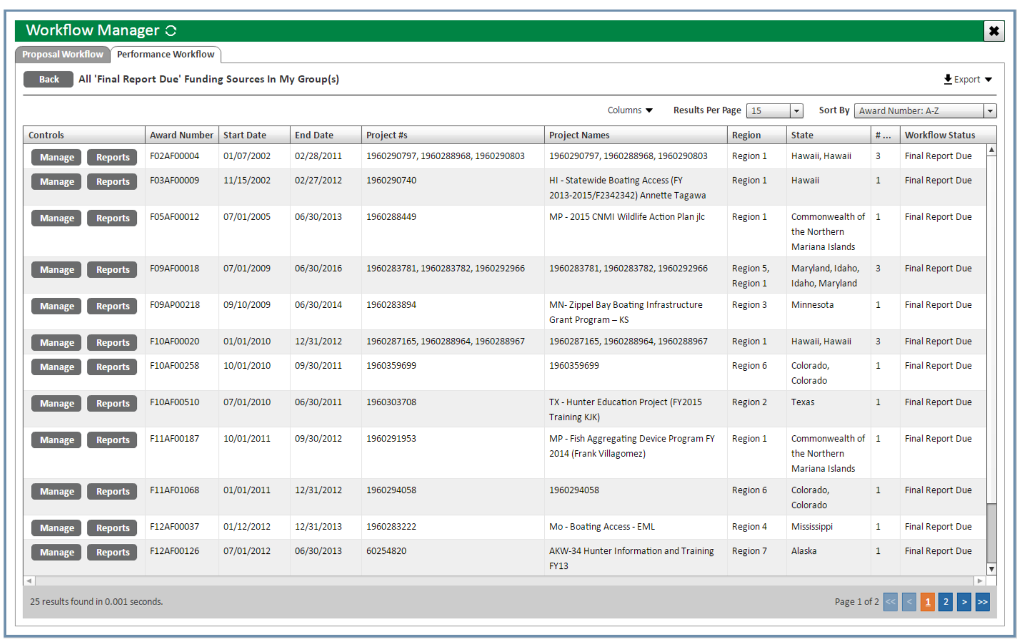


To pull a filtered list of Performance Reports:

- This page is identical to the main page of the project statement tab with the exception that the filters will based on performance reporting instead of project statements.
    - Select a filter to open it. Use the Controls column to preview, edit, copy or delete a filter.

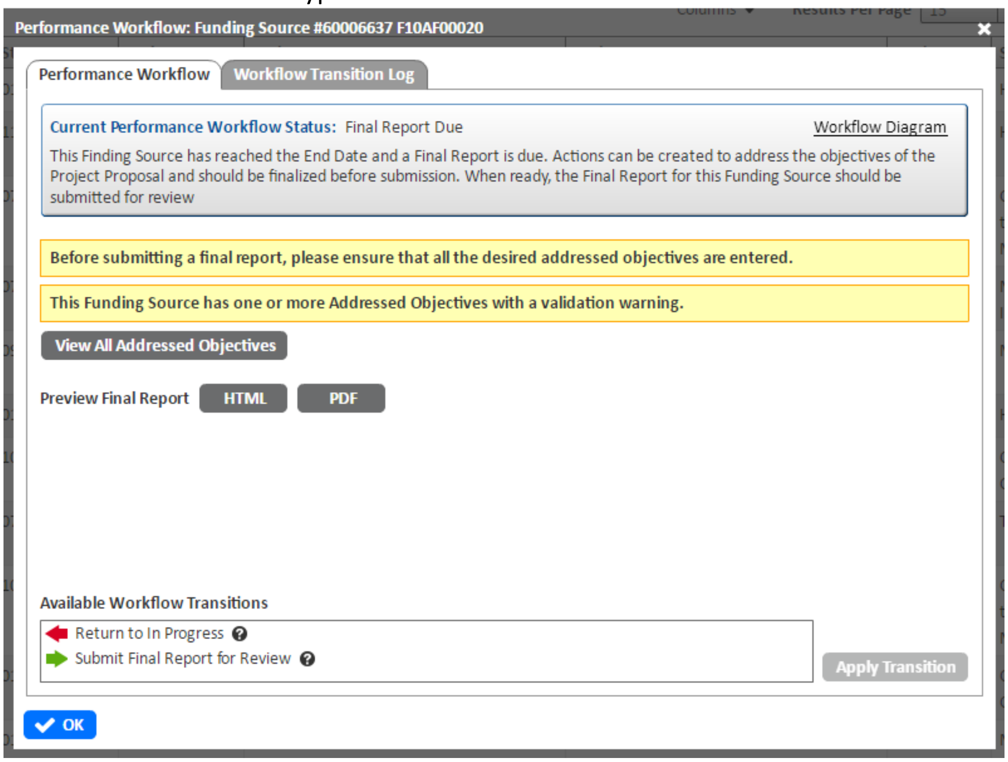


- The results page will display with each ***funding source award*** listed per row. This is because the Performance Workflow is "grant-centric" instead of Project Centric. This means that reports using the Workflow Manager are created at the grant level and therefore may contain multiple projects associated with that one grant. To manage an individual project, use the Guided Process Tool from the mapper instead.
- Customize the results page:
    - When the results appear check in the lower right corner of the window to see if the search has produced multiple pages.
    - The window can be customized by the columns displayed, results per page, and sorted by fields in the upper right.
    - The **Export** button allows you to download an Excel spreadsheet displaying "All Columns" or "Visible Columns". Note that the "visible columns" option will download only the columns you have selected, but for ALL of the pages of results.

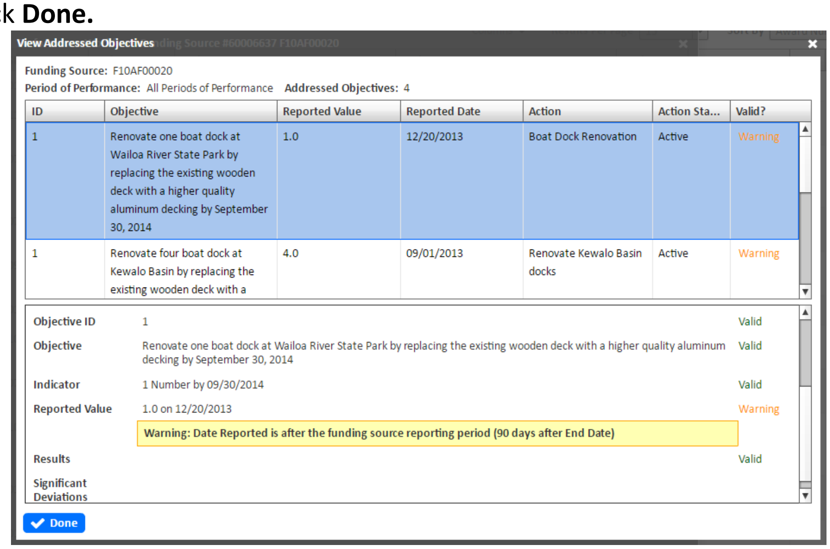


To manage the workflow for a funding source:

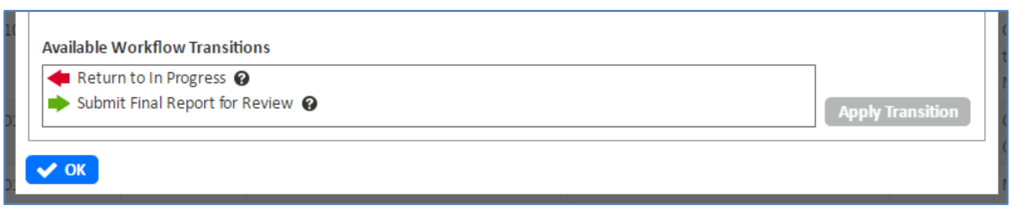
- Select the **Manage** button to the right. This will open the workflow form to manage all projects associated with that funding source. Note: You can use the Workflow Manager **or** the Guided Process Tool to send the project through the workflow steps.
- Error messages (in red) and warnings (in yellow) will appear at the top of the window. Errors must be fixed before proceeding, whereas "Warnings" which appear in yellow are information and be bypassed.



- Click on the **View All Addressed Objectives** to view a list of all of the objectives associated with that grant. Tip: Actions that will be included in the Final Report should have a status of "Completed". Select an objective to view validation details. To return to the previous screen, click **Done.**



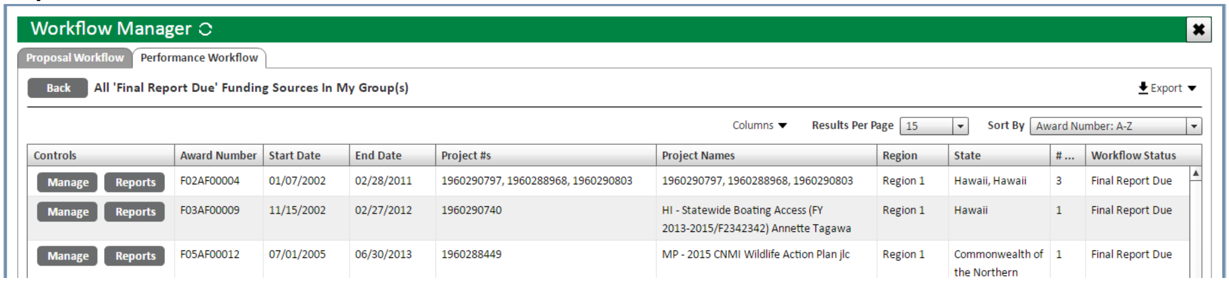
- Select the desired workflow process and click **Apply Transition**.
    - The final report begins with a status of "**Unassigned**" before the funding source has been associated with the project by WSFR (Step 4 Associate Funding Source in the Guided Process Tool).
    - Once the funding source is associated with the project, the system should automatically change the status of the Performance Report to "**In Progress**" (if the status does not update contact the Help Desk).
    - When the final report is due, the editor (state or federal) will need to select "**Set Final Report Due**" and click **Apply Transition.**
    - The state or federal editor will need to select "**Submit Project Proposal for Review**" and apply the transition to change the status to "**Pending Review**".
    - The federal reviewer will have the option to select "**Approve Final Performance Report**" or "**Do Not Approve Final Performance Report**".
    - Once the project is approved, the status will display as "**Approved Final Performance Report**".
    - If the data needs to be edited after the proposal has been approved, contact the federal reviewer to rescind approval. The federal reviewer can "**Rescind Approval and Set to In Progress**" which allows the state editor to make any changes and submit the report for approval again. The other option to "**Rescind Approval and Set to Final Report Pending Review**" allows the federal reviewer to make changes.



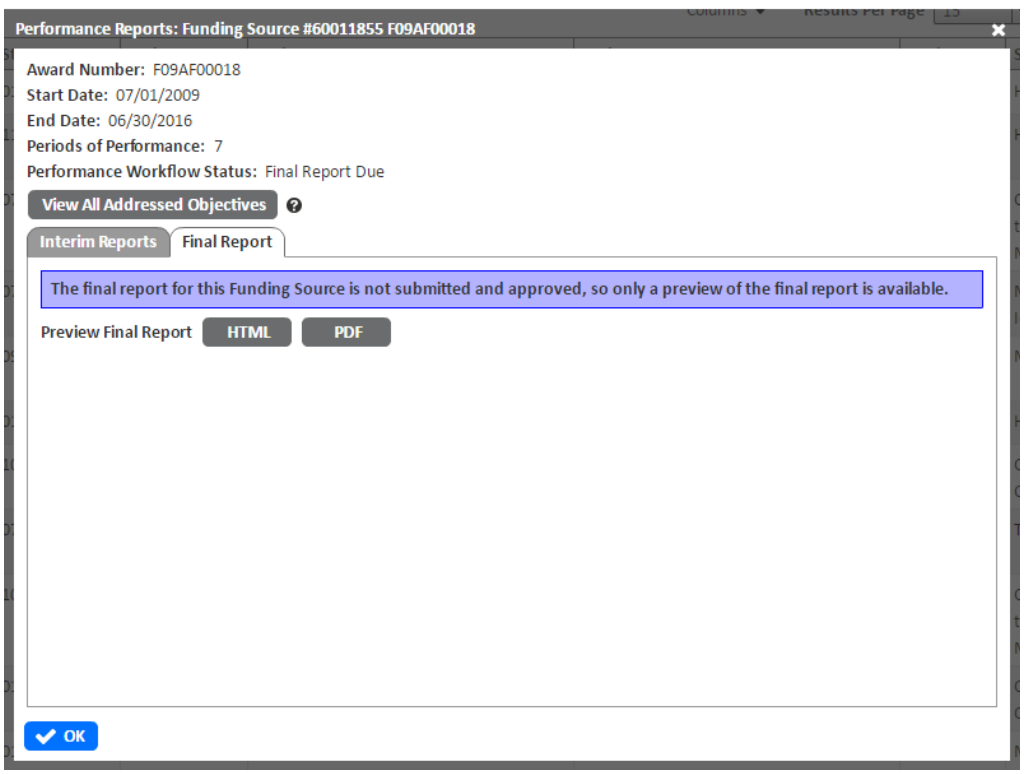
- Note: The system does not currently send automatic notifications, so you will need to follow-up with the reviewer to let them know when the final report is pending their review. Likewise, the federal reviewer should contact the editor when the final report is approved or if any revisions are needed.

To preview and generate reports:

- From the Performance Workflow tab, find the funding source for the project(s) and select the **Reports** button.



- The Performance Reports window will open for that funding source. The tabs allow you to work with **Interim** or **Final** reports.
    - The **Interim Reports tab** allows you to generate an ad-hoc interim report. See the next chapter for more information.
    - The **Final Report tab** allows you to preview the final report in HTML or PDF formats. Note: The final report is a full comprehensive report based on the funding source, but will only be a preview until the final report has been approved. Once it is approved, the PDF will be the only option.
    - Click **Ok** to close the window.



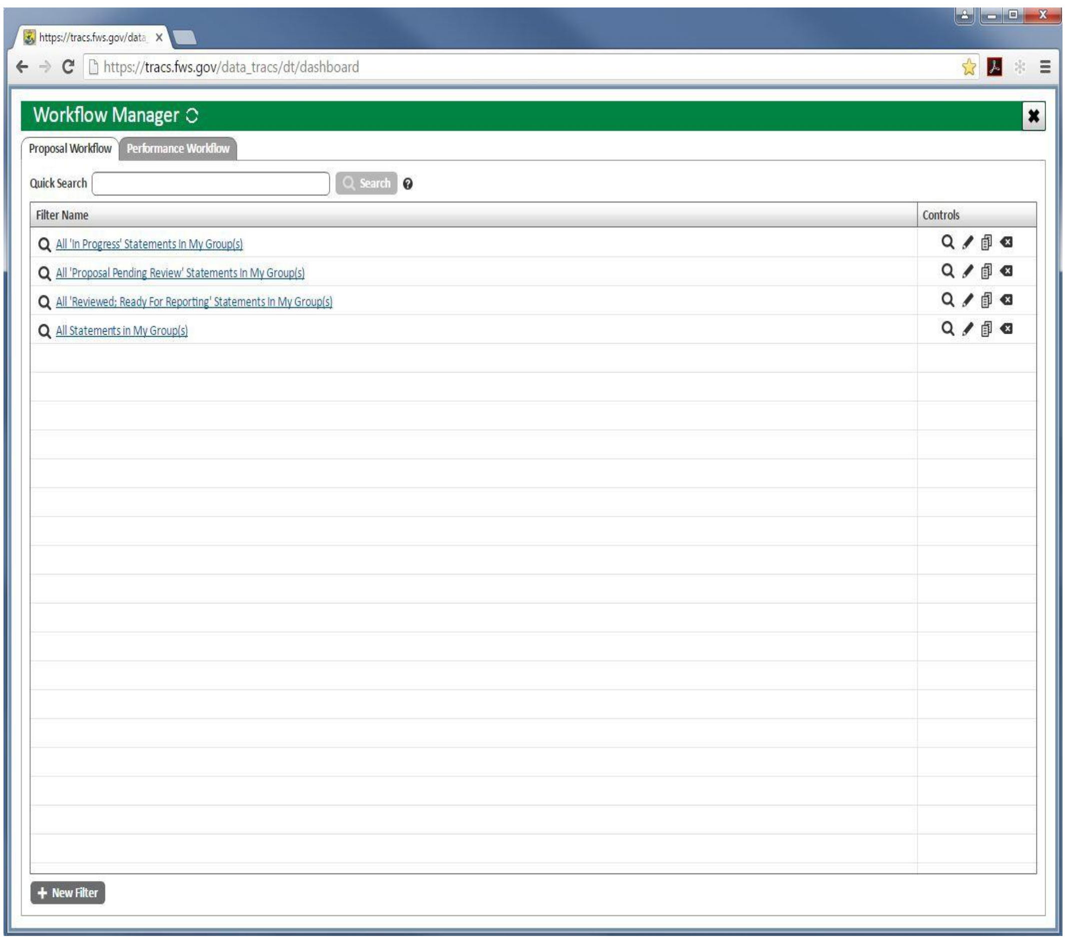
- To close the Workflow Manager, click the **X** in the upper right.

Filters for Workflow Manager

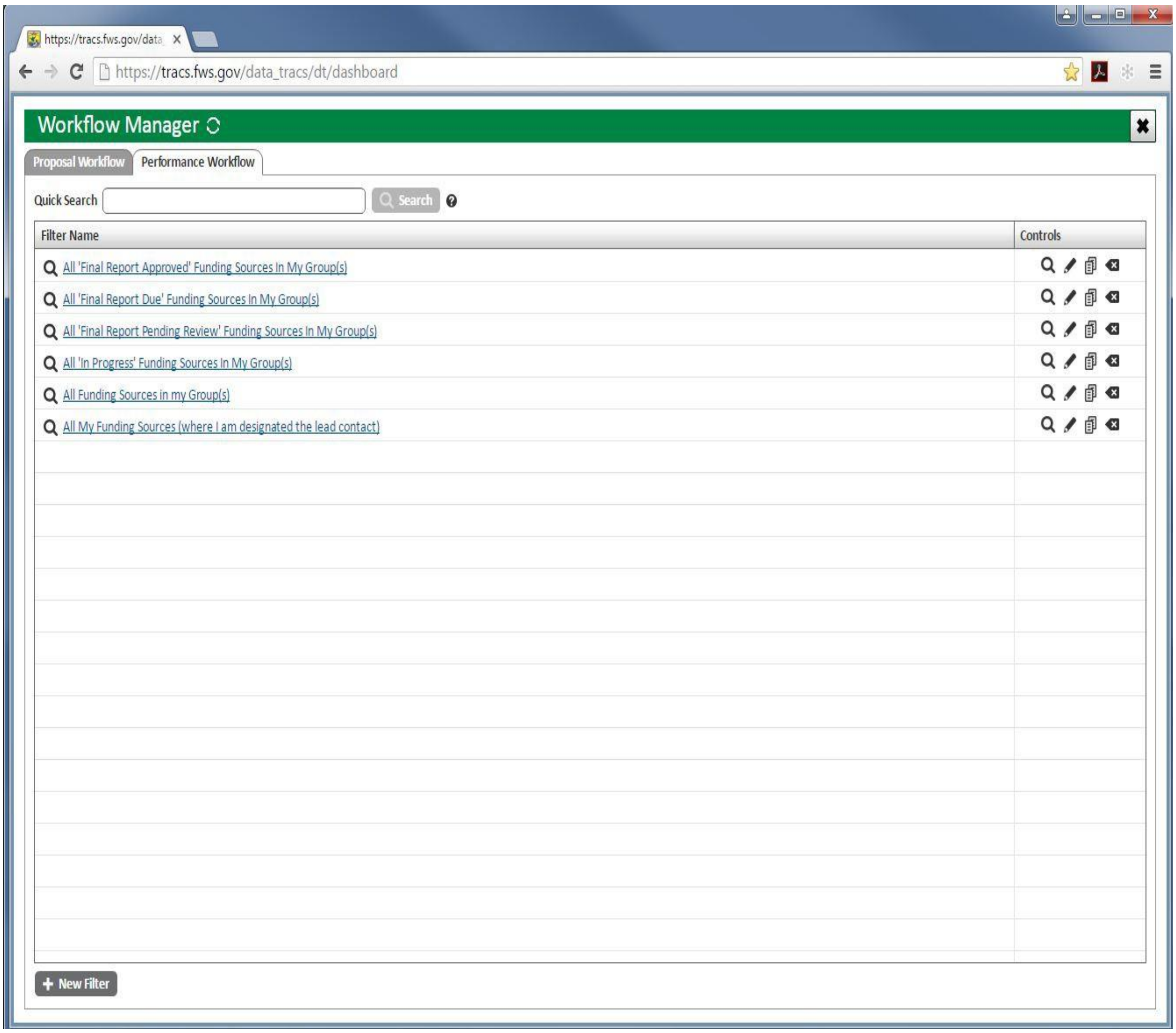
The Workflow Manager opens on the filtering and search options page. This window allows you to search for a project by name or number in the "Quick Search" box or to select, edit or create a filter to customize your search results.

Both the "Proposal Workflow" and "Performance Workflow" tabs have default filters that allow you to look up projects in your group(s) that are in various stages of approval. Your group refers to the agency/department/region that you access to in TRACS.

- Default filters for the Proposal Workflow tab:
    - All 'In Progress' Statements in My Group(s)
    - All 'Proposal Pending Review' Statements in My Group(s)
    - All 'Reviewed Ready for Reporting' Statements in My Group(s)
    - All Statements in My Group(s)



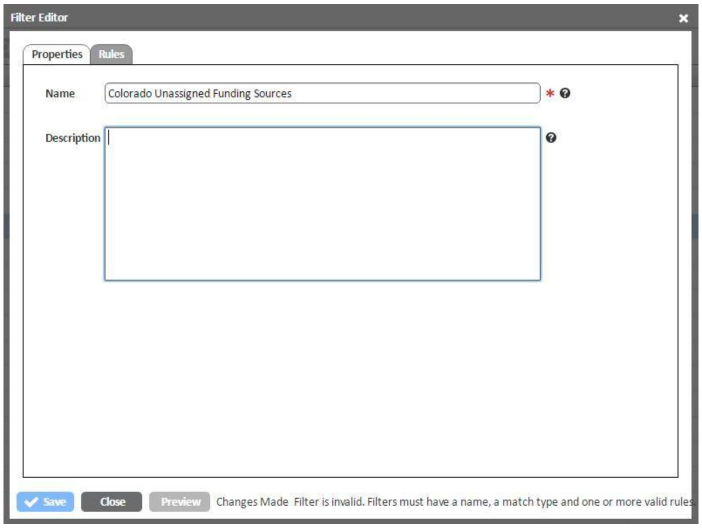
- Default filters for the Performance Workflow tab:
  - All 'Final Report Approved' Funding Sources in My Group(s)
  - All 'Final Report Due' Funding Sources in My Group(s)
  - All 'Final Report Pending Review' Funding Sources in My Group(s)
  - All 'In Progress' Funding Sources in My Group(s)
  - All Funding Sources in My Group(s)
  - All My Funding Sources (where I am designated the lead contact): note the lead contact refers to grantor/grantee contacts marked as a lead contact on the funding source form.



In addition to the default filters, you also have the option to create a "New Filter". This allows you to create a custom filter based on the rules you set up.

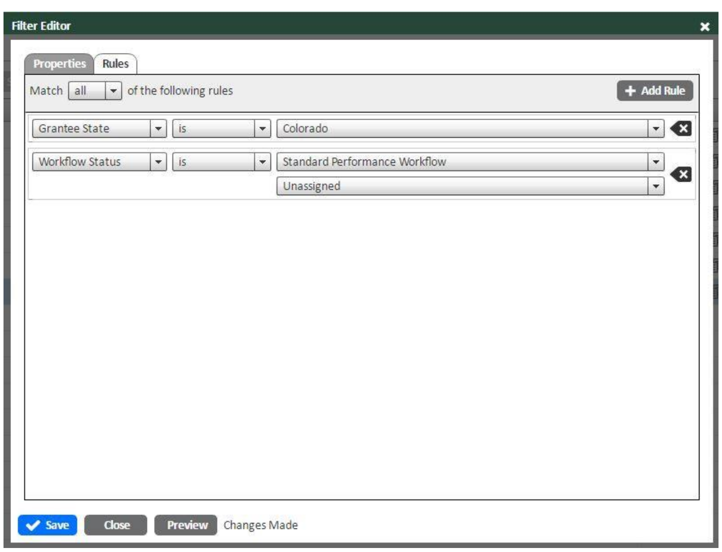
To create a new filter:

1. The **New Filter** button at the bottom of the window allows you to create a custom filter.
2. Enter a name for the filter (optional: enter a description).
3. Click on the **Rules** tab.

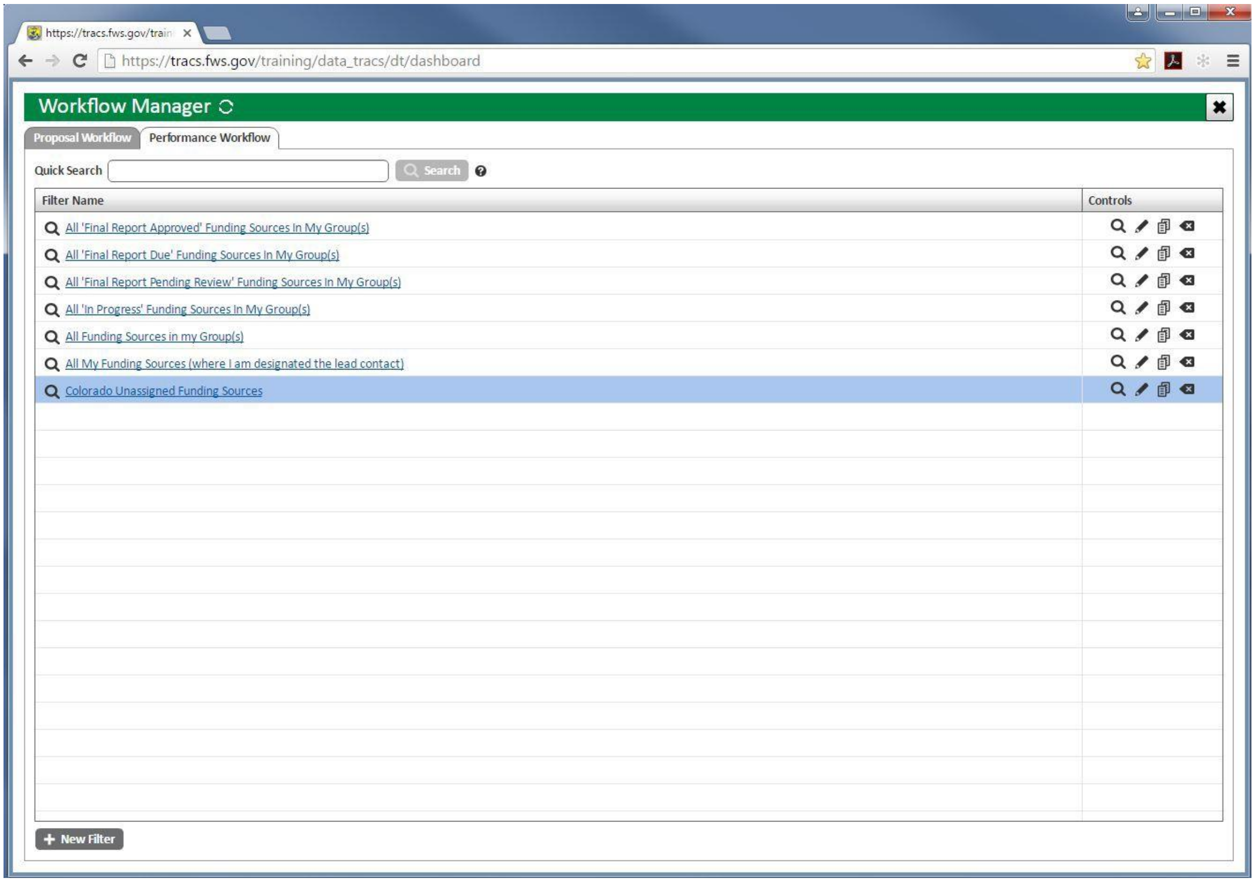


4. Click **Add Rule** to add one or more rules for your custom filter.

- Use first drop down menu on the left to select a rule (see the **Filter Rules Table** at the bottom of the page for information).
- Use the second drop down menu that appears to the right of the rule to add the criteria that it must meet (i.e. "is", "is not", "is one of", or "is not one of").
- Add additional rules following the steps above.
- Tip: Use the "Preview" button to "test" your filter and view a list of projects that meet the filter rules.



- Click **Save** and **Close**. The custom filter will display on the main window.



- Click on the filter to open it. The Controls (right side) include:
    - Preview Filter
    - Edit Filter
    - Copy Filter
    - Delete Filter

Filter Rules Metadata:

There are many rules that you can use to create a custom filter on the proposal tab or performance workflow tab. Keep in mind that the Proposal tab searches by Project Statement, whereas the Performance Workflow tab searches by Funding Source.

Some examples of filters you could create:

- Create a filter to find project statements belonging to a particular group or agency that are "In Progress" or "Pending Review". To create this filter, add a new filter on the Proposal tab with a rule to search for "Project Group is the agency/department". Then add another rule to search by "Project status is one of 'In Progress' or 'Proposal Pending Review'".
- Create a filter to find **funding sources that are unassigned** (in other words, funding source awards in FBMS that have not yet been assigned to a project in TRACS). To create this filter, add a new filter on the Performance Workflow tab with a rule to search for "Workflow Status is Unassigned", then add additional rules to narrow the results by agency, region, and/or grant specialist etc.

Proposal Workflow Rules

Rule	Description
Lead PI	This refers to the **Principal Investigator** on the Statement Properties Form - Properties tab
Primary Agency	This refers to the **Primary Agency** on the Project Properties Form - Properties tab
Project Group	This refers to the **Project Group** on the Project Properties Form - Groups tab
Project State	This refers to the state where the project shape is located.
Project Status	This refers to the **Project Status** on the Project Properties Form - Properties tab
Workflow Status	This refers to the **Workflow Status** that is displayed to the right when "Generate Project Proposal" is selected from the Guided Process Tool

Performance Workflow Rules

Rule	Description
End Date	This refers to the **End Date** on the Project Properties Form - Properties tab
Grant Program	This refers to the **Grant Program** on the Funding Source Form - Properties tab
Grant Specialist	This refers to the **Grantor/Grantee** on the Funding Source Form - Contacts tab
Grantee Agency	This refers to the **Grantee** on the Funding Source Form - Grantees and Grantors tab
Grantee Region	This refers to the region where the Grantee is located
Grantee State	This refers to the state where the grantee is located
Lead PI	This refers to the **Principal Investigator** on the Statement Properties Form - Properties tab
Project Group	This refers to the **Project Group** on the Project Properties Form - Groups tab
Region	This refers to the region where the project shape is located
Start Date	This refers to the **Start Date** on the Project Properties Form - Properties tab
State	This refers to the state where the project shape is located
Workflow Status	This refers to the **Workflow Status** that is displayed to the right when "Submit Performance Report" is selected from the Guided Process Tool

Generating an Interim Report

The Workflow Manager is the only place users can generate Interim Reports. An interim performance report is not saved as a static report in the TRACS system; instead it can be generated on-demand and does not require any approval steps.

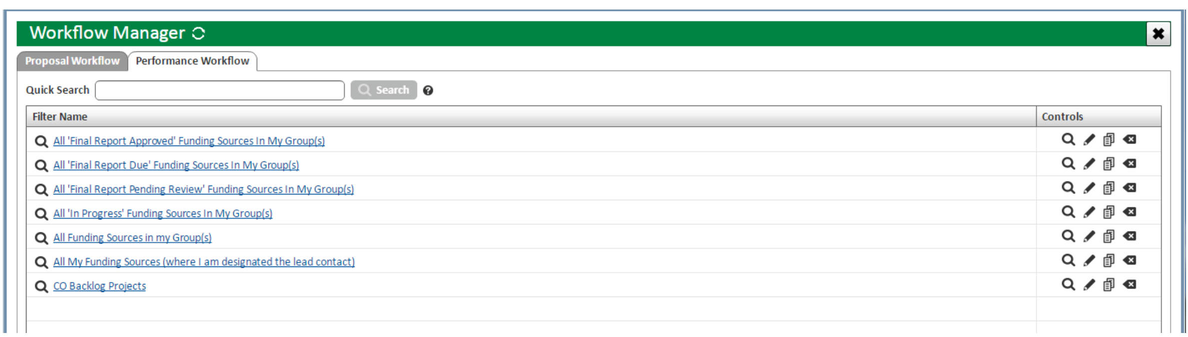
Keep in mind that the final performance report workflow is available through the Guided Process Tool on the Mapper or using the Workflow Manager.

Note: The Performance Workflow tab on the Workflow Manager is organized by funding source, not by individual project (i.e. Final or Interim Report generated using the Workflow Manager include ALL projects associated with that funding source and cannot be generated individually).

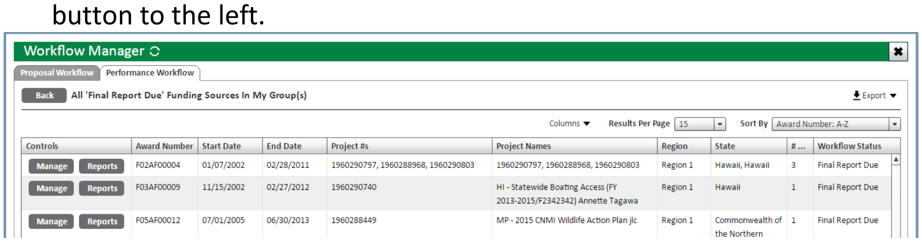
Tip: To generate an interim report, a funding source must be associated with the projects that will be included in the report. The actions that will be included must have a status of “Active” or “Completed” and the “Objectives Addressed” tab must be filled out (either for Narrative or SMART objectives). The “Reported On” date must fall within the Period of Performance in order to generate an Interim Report for that time frame.

1. From the Workflow Manager main page, select the **Performance Workflow tab**.

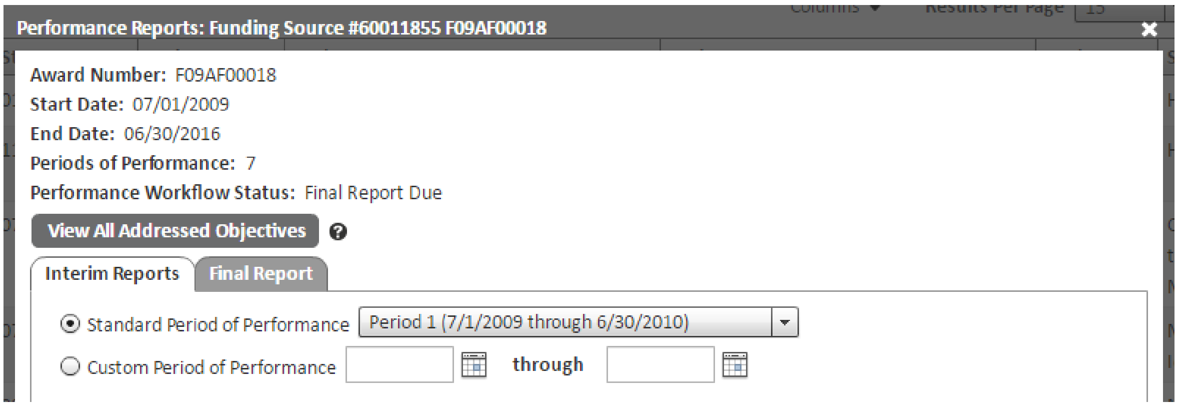
2. Select one of the filters or use the “Quick Search” bar to lookup a funding source by name or number. Tip: Searching by project name will pull up search results including “exact” matches and “similar” matches. To pull up the exact funding source, search using the Award Number or Project TRACS ID number.



3. The Results page will open. Find the Award Number for your project(s) and select the **Reports** button to the left.



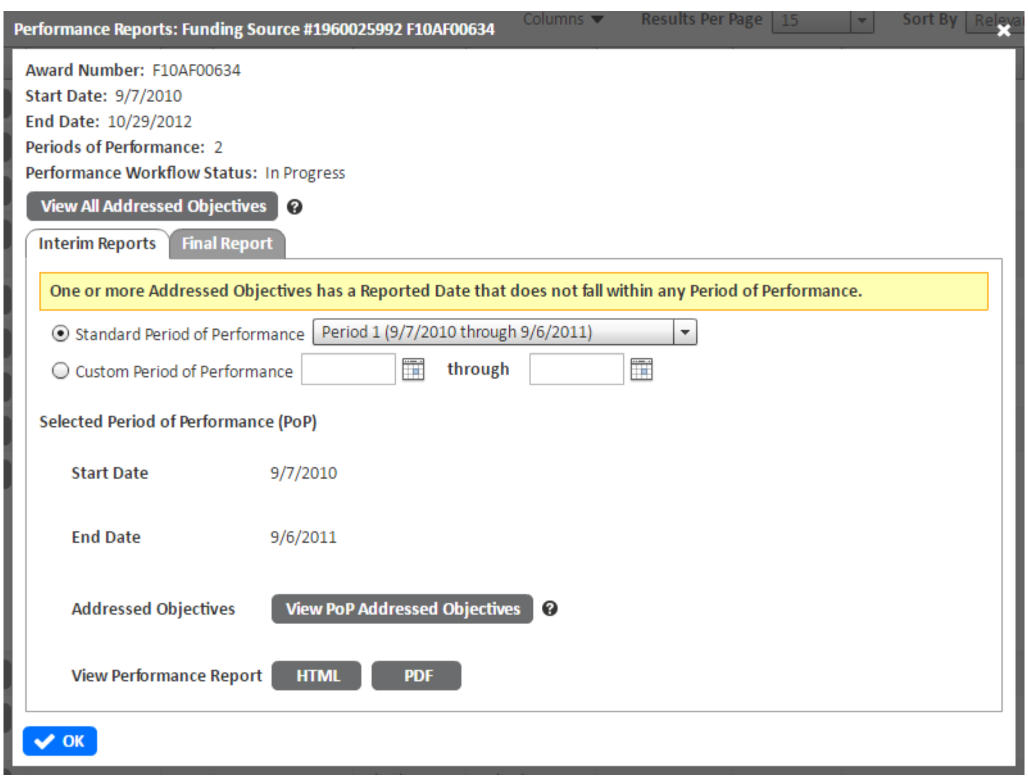
4. The **Interim Reports tab** will open and display the award details at the top of the window.



5. Select the date range by choosing:
   - **Standard Periods of Performance:** select the year from the drop down

     or
   - **Custom Period of Performance:** select the start and end dates from the calendars

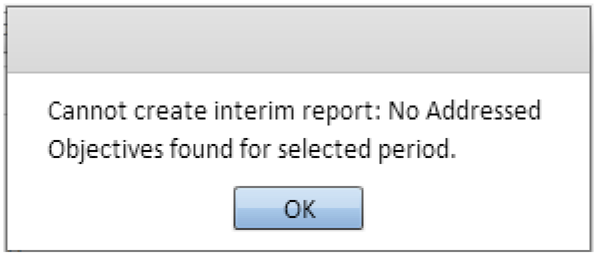
6. The Selected Period of Performance (PoP) will display based on the selected dates.
   - If the date range selected does not have any "Addressed Objectives" that have a reported on date within the Period of Performance, the following warning message in yellow will appear.



7. Click the **View PoP Addressed Objectives** button to view objectives that will be included in the report. Click on an objective to review any warning or error messages that may need to be fixed. If no objectives are displayed, it is because there are none within that Period of Performance (PoP).

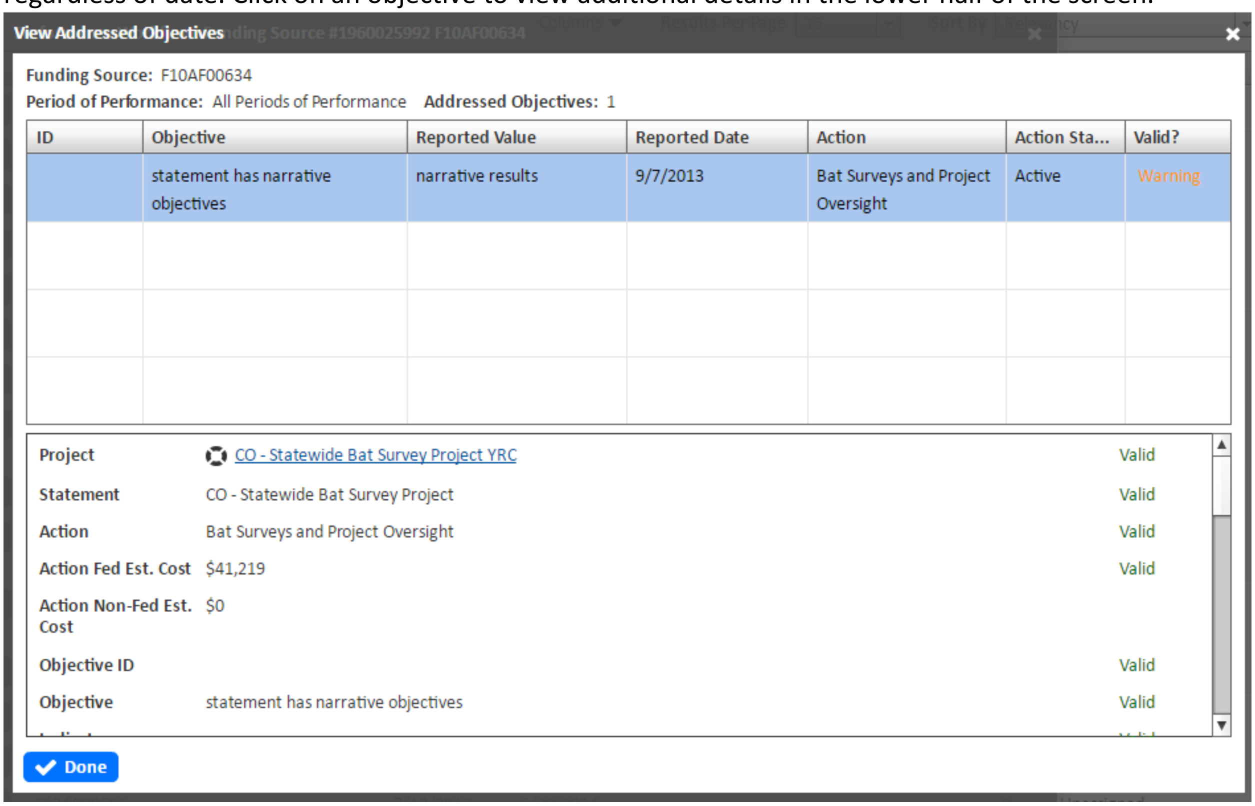
8. The Interim Report is available to view or download by selecting the **HTML** or **PDF** buttons.

- TIP: In order to generate an interim report, the "Reported On" date for the objectives must fall within the selected Period of Performance. This error message below will appear if there are no objectives that fall within the Period of Performance selected for the report.



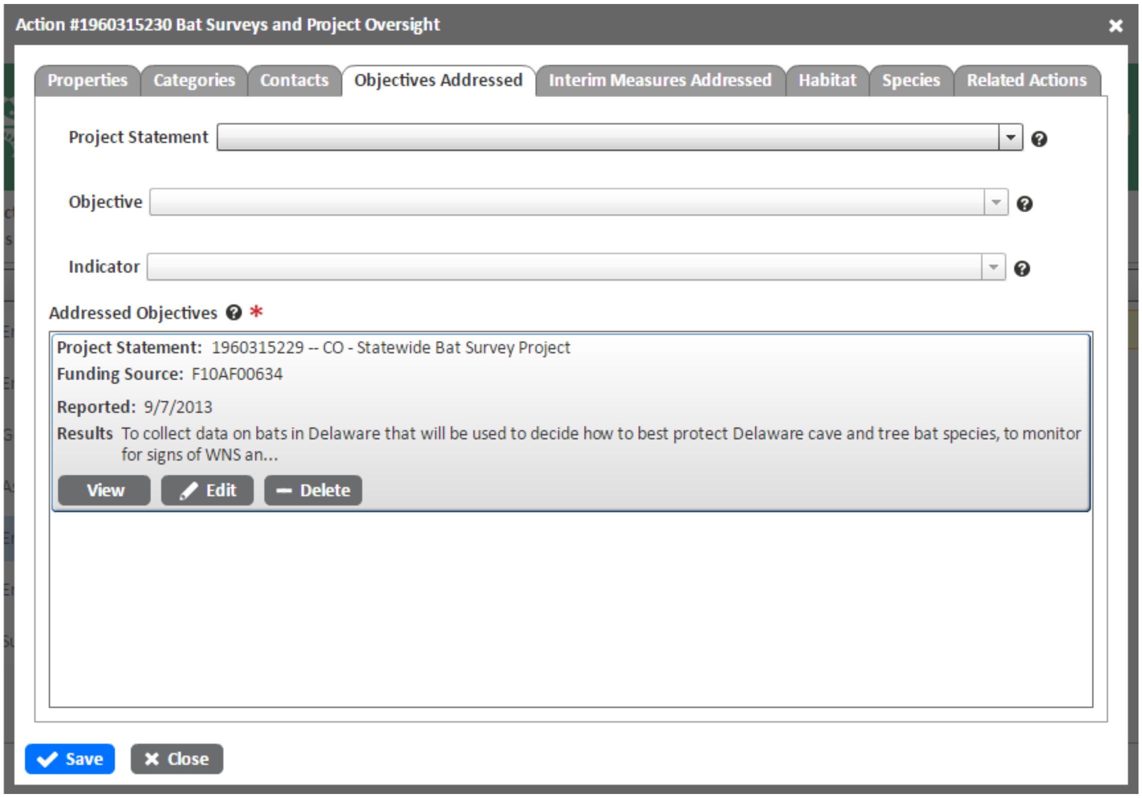
To edit the "Reported On" date:

- Click on the **View All Addressed Objectives** button at the top of the window to see all objectives regardless of date. Click on an objective to view additional details in the lower half of the screen.

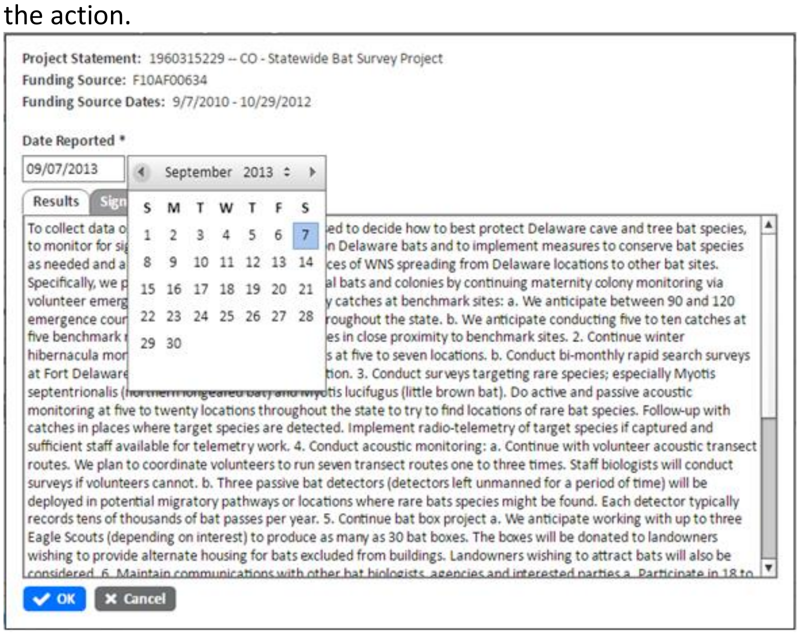


- Click on the Guided Process Tool link for the project.
- Select task **5. Enter Action Data** on the left.

- Select the **View/Edit Action Properties** link below the action.
- Select the **Objectives Addressed** tab and click on the gray box in the lower half of the screen.
- Select the **Edit** button.



- Select the calendar icon to change the date. In order to include this result in the Interim Report, the date must fall within the desired Period of Performance. Click **OK** and then **Save** and **Close** the action.



Lesson 21: FBMS Reports in TRACS

This chapter provides some information about the FBMS Reports available in the TRACS live system (note: they are not accessible from the TRACS Training Environment).

What are FBMS Reports?

The Financial and Business Management System (FBMS) is the Department of Interior enterprise financial system implemented and rolled out to all Department Bureaus. The TRACS system provides the "Reports" module on the Dashboard to allow state users to access reports from FBMS.

Where can I get more information about how to access FBMS Reports?

Information about FBMS is maintained by the Financial Assistance Systems Branch.
For current information about FBMS reports and how to access them in TRACS, visit:
https://fawiki.fws.gov/display/WRUG/WSFR+Reports+User+Guides+Home

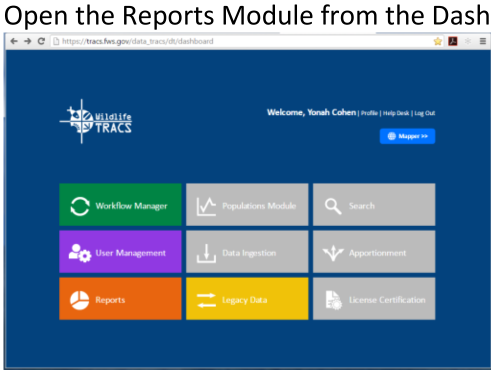
How do I use the Custom "Disassociated FBMS Funding Source Report"?

As of August 2016, a new custom report is available in the Reports Module in TRACS to help users track the backlog of grants that need to be entered into TRACS.

The "Disassociated FBMS Funding Source Report" generates a spreadsheet of all funding sources imported into TRACS from FBMS that are disassociated from project data. The criteria for 'disassociated' is that the funding source is in the initial TRACS workflow status "Unassigned" and the funding source is not associated with any Project Statement (including Legacy Records). Disassociated funding sources should be addressed as part of the data entry backlog.

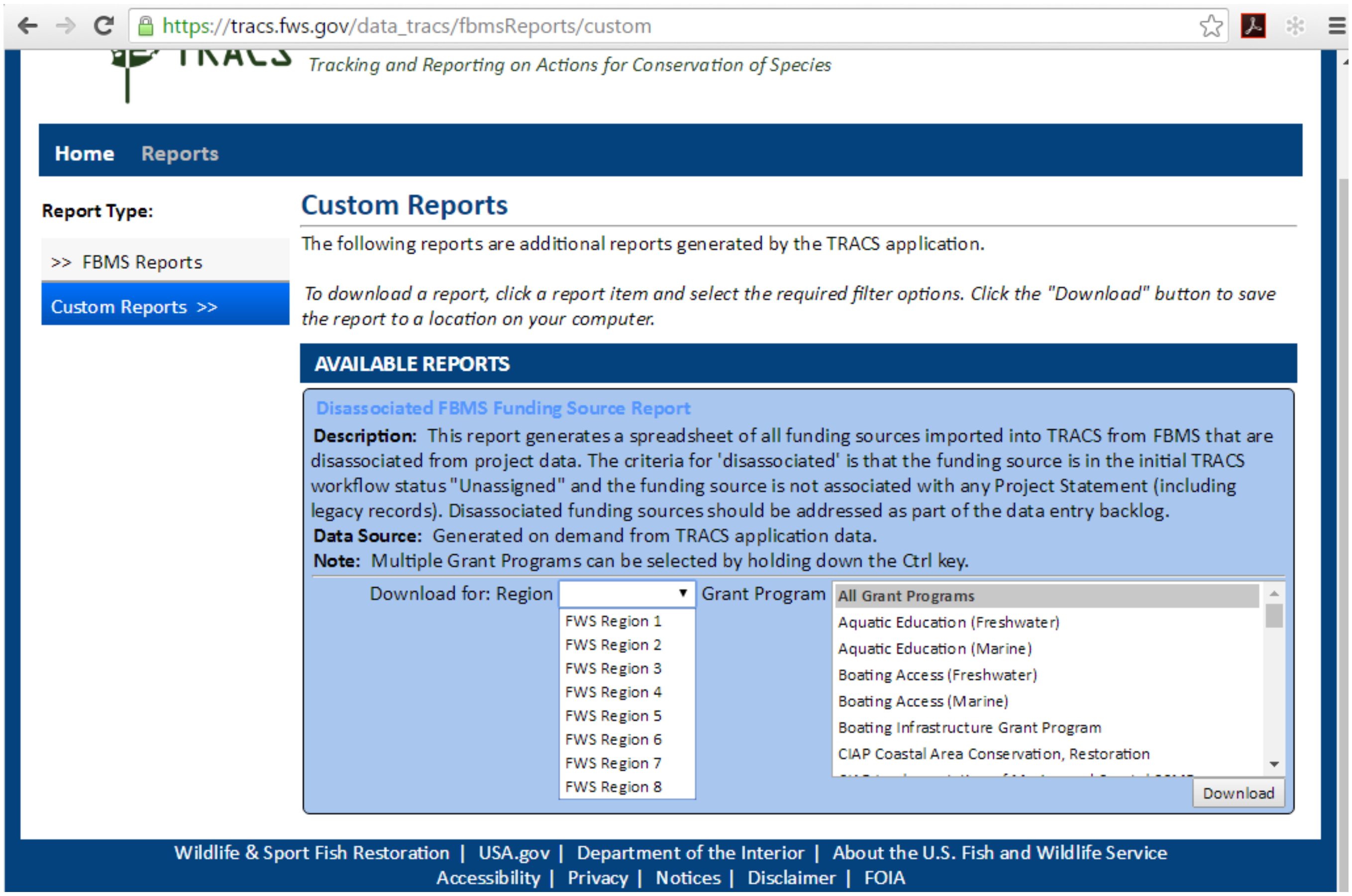
Tip: Google Chrome is the recommended browser to download this report.

1. Open the Reports Module from the Dashboard.



2. Select the **Custom Reports** tab on the left and click on the **Disassociated FBMS Funding Source Report** to expand the window.

- Select the Region and the Grant Program(s). You have the option to select “All Grant Programs” at the top or use the Ctrl key to select more than one program from the list if needed).



3. Click the **Download** button in the lower right to download the search results report as an Excel spreadsheet.

   Note: This report displays all funding sources in TRACS that have a workflow status of “Unassigned” and are not associated with any Project Statement (including legacy records).

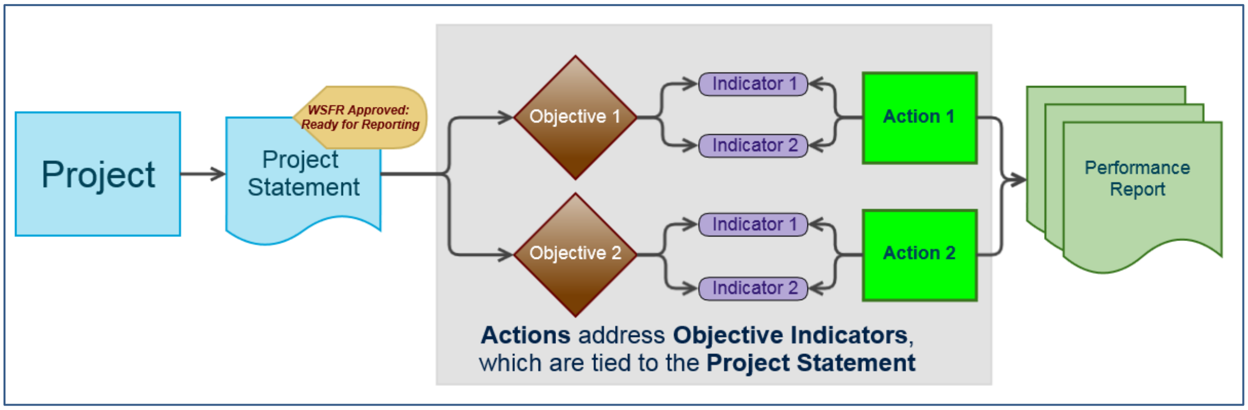
   The TRACS team is working on mapping the FAIMS ID to the FBMS number in order to remove the legacy records from the report. Currently, legacy records will display the FAIMS ID on the report in lieu of the FBMS SAP/PO number.

   Tip: To view or remove the legacy records from the report, sort the report by date or award number (note: the two digits in the prefix of the award number indicates the Fiscal Year, e.g. F08AF00011 = FY 2008). Records after FY 2012 should reflect the current backlog of projects that need to be entered onto the mapper (without legacy records).

Lesson 22: Project Structure and Tips

Project Structure Overview

- **Project:** geo-spatially represented, defines overall type of work
- **Project Statement(s):** correlate desired outcomes, actions and costs
- **Objectives:** specific goals that will be reported as actions



Project Tips

- Design the project with reporting needs in mind
- Fields for public display should be written in common language free of scientific jargon and acronyms (fields will display eye icon)
- TRACS project information is not meant to have the level of detail required in a thesis or scientific paper, so remember to summarize and shorten lengthy narratives whenever possible
- Write or outline the project proposal and save in an electronic copy (i.e. Word or PDF) then copy and paste into the appropriate TRACS fields
- Well written and organized projects can be copied in the future for similar/ongoing projects (such as Operations and Maintenance) using "Copy Project"
- Think "backwards" in terms of objectives and actions to determine approach (Use the **TRACS Action Level Spreadsheet** to "reverse engineer" the project based on the desired outputs)
- Make the objectives "SMART" instead of narrative

TRACS affords many possible grant/project structures. All projects, regardless of TRACS structure, should result in the same reportable TRACS ACTIONS.

- **Two basic methods:**
  - 1:1 One Project and One Project Statement
  - 1: 2+ One Project with Multiple Statements (used for multi-year or multi-grant programs)

- **Design Factors:**
  - **Workload:** one project with multiple statements can share a project properties reducing workload
  - **Public Perception:** what does the public see? One project vs. many projects in the same location (ex. multi-year project)
  - **Spatial Data:** project with multiple statements should all have the same project boundary
  - **Complexity:** how many projects or project statements can be effectively managed in the workflows

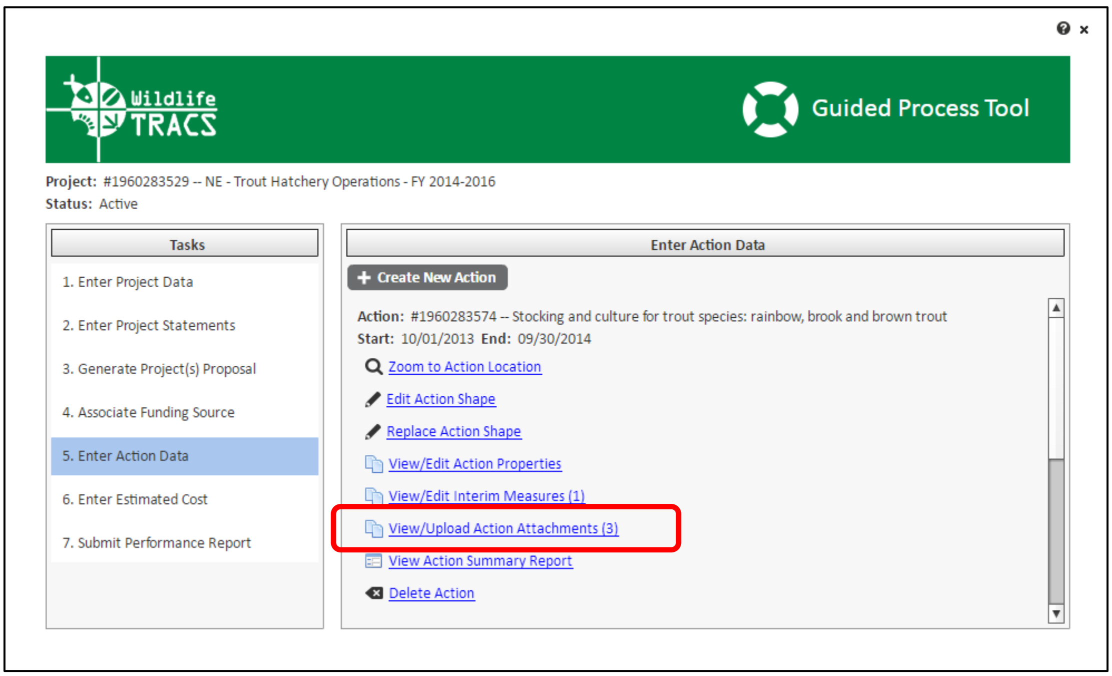
Tip: To simplify the project design and reduce workload, be a "lumper" instead of a "splitter" by creating one project with one project statement for one grant award whenever possible. Add detail to the approach and use the objectives, indicators and actions to differentiate and report on the types of work being done.

Lesson 23: Adding Attachments

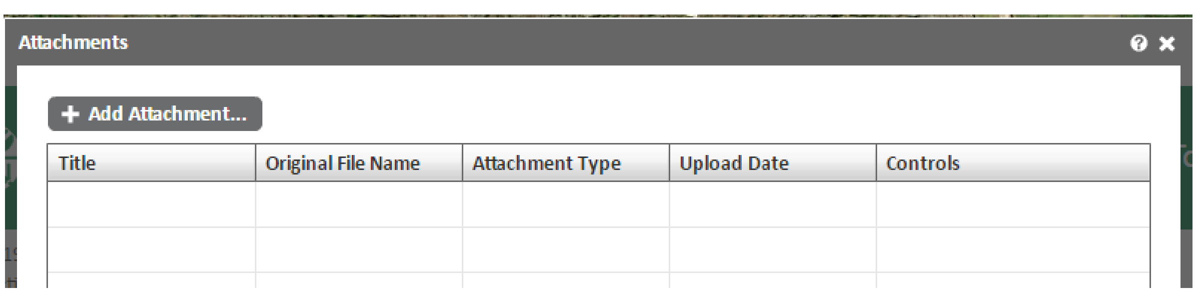
Attachments may be added at the plan, project or action level.

Important Note: Any documents containing Personally Identifiable Information (PII) should **NOT** be uploaded to TRACS. PII information should be redacted if stored in TRACS, or the sensitive documents should be stored only as hard copy in the permanent administrative record. These documents will not automatically transmit to the WSFR Office (but can be accessed within TRACS by other users).

1. From the Guided Process Tool, open **Task 1 Enter Project Data** or **Task 5 Enter Action Data**. Select the **View/Upload Project Attachments** link located in the right panel.

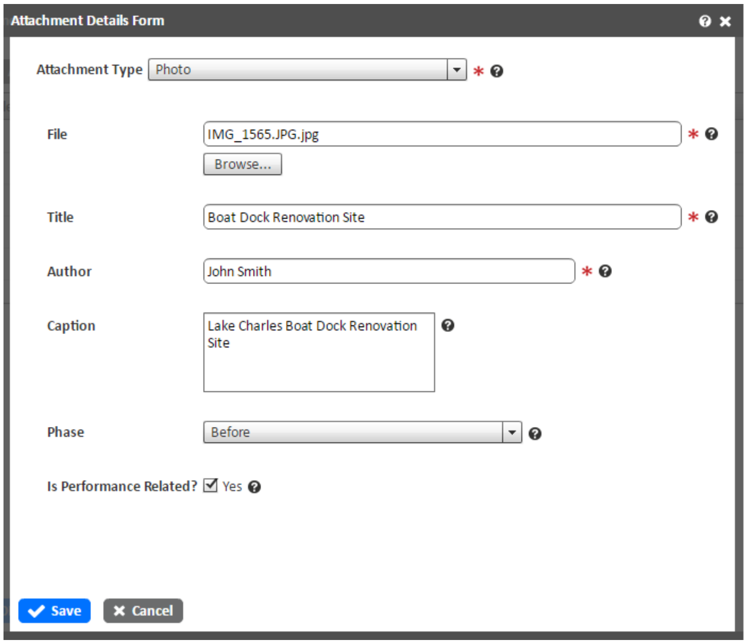


2. Click the Add Attachment button.

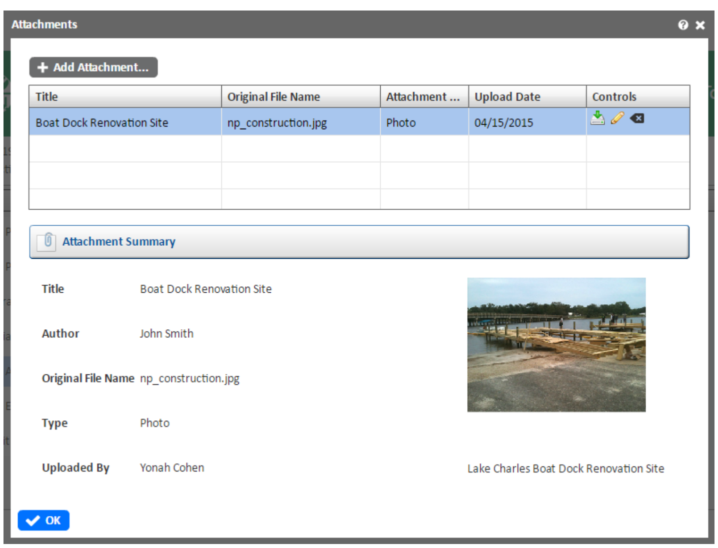


3. Fill out the Attachment Details form:
   - Select the Attachment Type (e.g. document, map, photo, video).

- Click the Browse button to locate and select the local source file.
- Enter the Title, Author and Abstract/Caption.
- Indicate if the attachment is **Performance Related** by selecting "Yes." A link to the attachment will be included in the performance report.
- Click the Save button.



4. The attachment will be listed in the attachment grid once it is successfully uploaded.
    - In the Control column the three controls allow you to download, edit or delete the attachment.
    - Select the attachment to see a summary and preview below.
    - Click **OK** to close the Attachment form.



Lesson 24: Legacy Data

This chapter covers how to locate and complete legacy projects in TRACS. The term “legacy” refers to projects that were originally entered into the Federal Aid Information Management System (FAIMS).

The Legacy module in TRACS is designed to allow WSFR to locate, modify and complete a grant entered in FAIMS by using the TRACS system. When FAIMS was decommissioned in 2012, projects were transferred into TRACS and many of those projects still need to be completed administratively to comply with federal regulations for reporting.

Only users with WSFR level permissions have access to the Legacy Module in TRACS and are responsible for closing out active legacy records by completing any missing fields.

Please go to the next sub-chapters for more information on:

- Understanding Legacy Grant Information
- Locating a Legacy Project
- Completing a Legacy Project

A Brief History of FAIMS…

Prior to 2012, the Federal Aid Information Management System (FAIMS) was used by the Wildlife and Sport Fish Restoration Program (WSFR) to track grant information and in some cases, accomplishment data. On October 1, 2012 the U.S. Fish and Wildlife Service decommissioned FAIMS and transitioned financial reporting to the Financial and Business Management System (FBMS), the enterprise-wide financial system for all bureaus of the Department of Interior.

TRACS was developed and released as the **project tracking and performance reporting system** for projects funded by WSFR administered grants. In order to reduce data entry for TRACS users, relevant FAIMS data was migrated to TRACS. Legacy data is defined as FAIMS data that included a Project and/or Accomplishment record.

NOTE: If a grant had no project or accomplishment data in FAIMS, the grant level information was not converted to TRACS and will need to be entered in the standard (non-Legacy) format using the Guided Process Tool from the mapper.

24a. Understanding a Legacy Grant

This sub-chapter covers how to understand legacy grant reports.

TIPS:

1. Decipher grant program and the activities from the grant ID and project name on the performance report. Review the "What's in a Performance Report File Name" examples below.
2. Read the performance report, front to back, before entering it into TRACS. This will help you understand what the grant is about (who, what, why, where, and how many) prior to updating the TRACS Legacy module.

What's in a Performance Report File Name?

Legacy Grant Naming Convention: **State Abbreviation Funding Source Number (FAIMS Identifier as prefix-number-FAIMS code-number) Project Name**

Prefix	Grant Program
W	Wildlife Restoration
F	Sport Fish Restoration
T	State Wildlife Grants (SWG) Traditional
U	SWG Competitive
E	Endangered Species
FW	Sport Fish and Wildlife Restoration

FAIMS Code	Activity
D	Development
HM	Habitat Management
T	Technical Assistance
L	Lands Acquisition
R	Research, Survey or Monitoring
B	Boating Access
E	Education and Shooting Ranges
C	Coordination
DB	Development, Boating

Example #1: "*SD F12AF0094 (F-84-D-25) Intensive Fisheries Management on Selected Lentic Waters.*"

- The yellow-highlighted prefix of "SD" is the state abbreviation.
- The underlined text starting with F is the funding source number.
- The green-highlighted prefix "F" in the FAIMS Identifier indicates the grant program.
- The blue-highlighted letter "D" indicates the activity.
- The project name provides more detail.
  Therefore, the file name identifies that this as a Sport Fish Development grant on South Dakota Lentic Waters. Use this information to complete the Project Name, Categories, and Description in Task 1 of the Guided Process tool.

Example #2: "*UT F12AF00726 (T-29-HM-1) Statewide Habitat and Technical Assistance.*"

- The file name identifies that this is a SWG-funded grant in Utah focusing on habitat management and technical assistance.

Example #3: "*NE F12AF00826 (W-109-T-17) Wildlife Friendly Fencing in Natural Landscapes*"

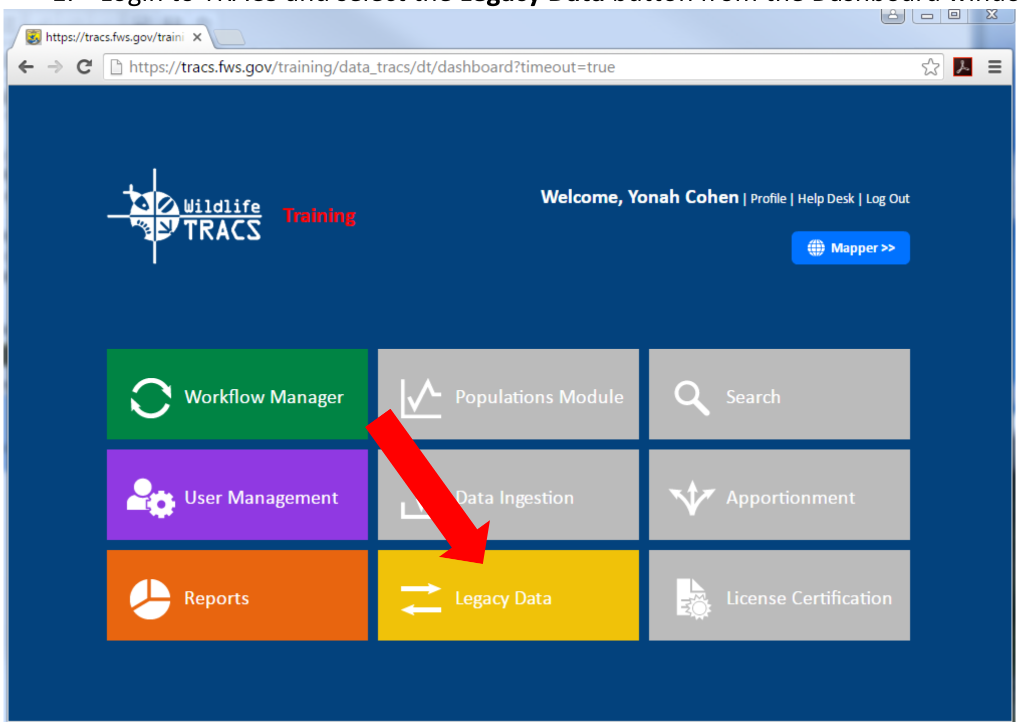
- The file name identifies that this as a Wildlife Restoration funded grant in Nebraska focusing on technical assistance pertaining to wildlife fencing.

Example #4: "*NE F11AF01126 (FW-6-C-73) Wildlife Friendly Fencing in Natural Landscapes*"

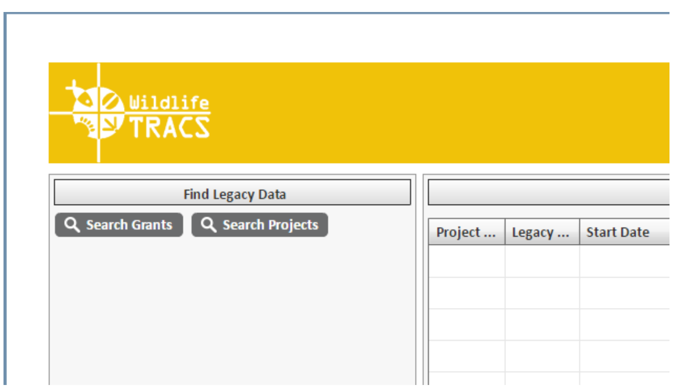
- The file name identifies that this as a combination of Sport Fish and Wildlife Restoration funds focused on fish and wildlife management and coordination.

24b. Locating a Legacy Project

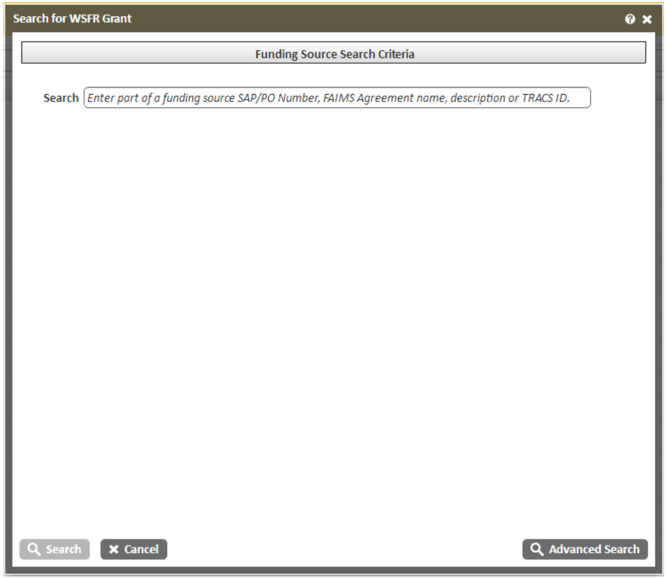
1. Login to TRACS and select the **Legacy Data** button from the Dashboard window.



2. Select the **Search Grants** button (preferred method). Note: The Project Search option is available as well, which will open the Guided Process Tool search window.



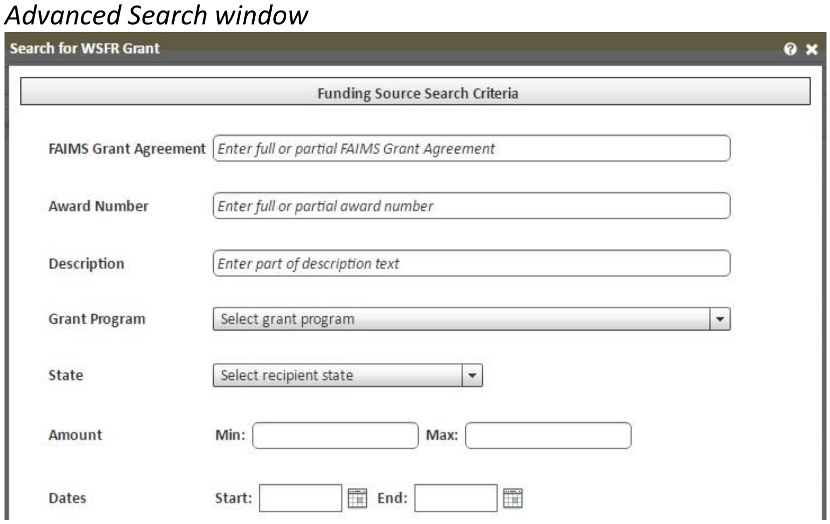
3. In the Search box, enter part of a funding source SAP/PO Number, FAIMS Agreement name or description (e.g., WA-W-83-HS-41 or F11AF00115). Click **Search** at the bottom left.



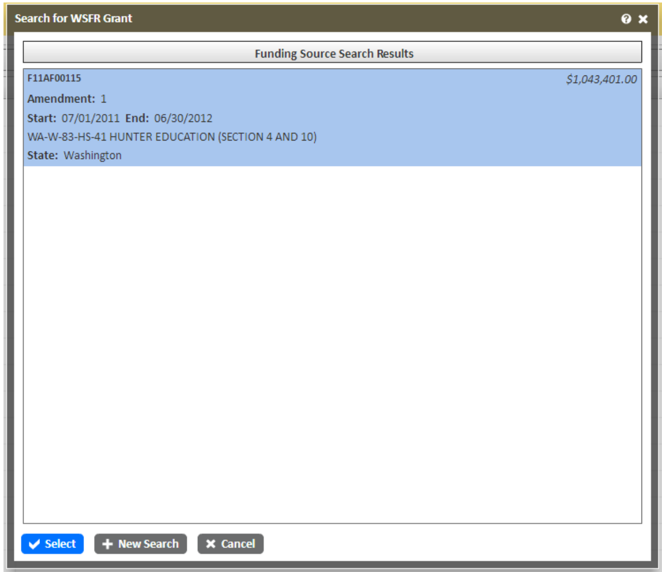
Search Tips:

- First try searching by using the FAIMS ID (referred to as the SAP/PO number), ex. FW-6-C-73. Make sure to enter with the dashes. The search will work with or without the State Abbreviation first.
- TIP: If you don't find the grant, erase the last section of the grant ID and try the search again. If you still don't find the grant, erase the next section and so on to try to expand your search.
- Another option is to search using the funding source number (example: F10AF00706)
- If the grant is not located, click on the **Advanced Search** button in the lower right of the window. Use the additional information from Step 1 in this guide to locate the grant. Search using the State ID, grant program and/or project description. (The start and end dates search is not fully functional, so it may not work).

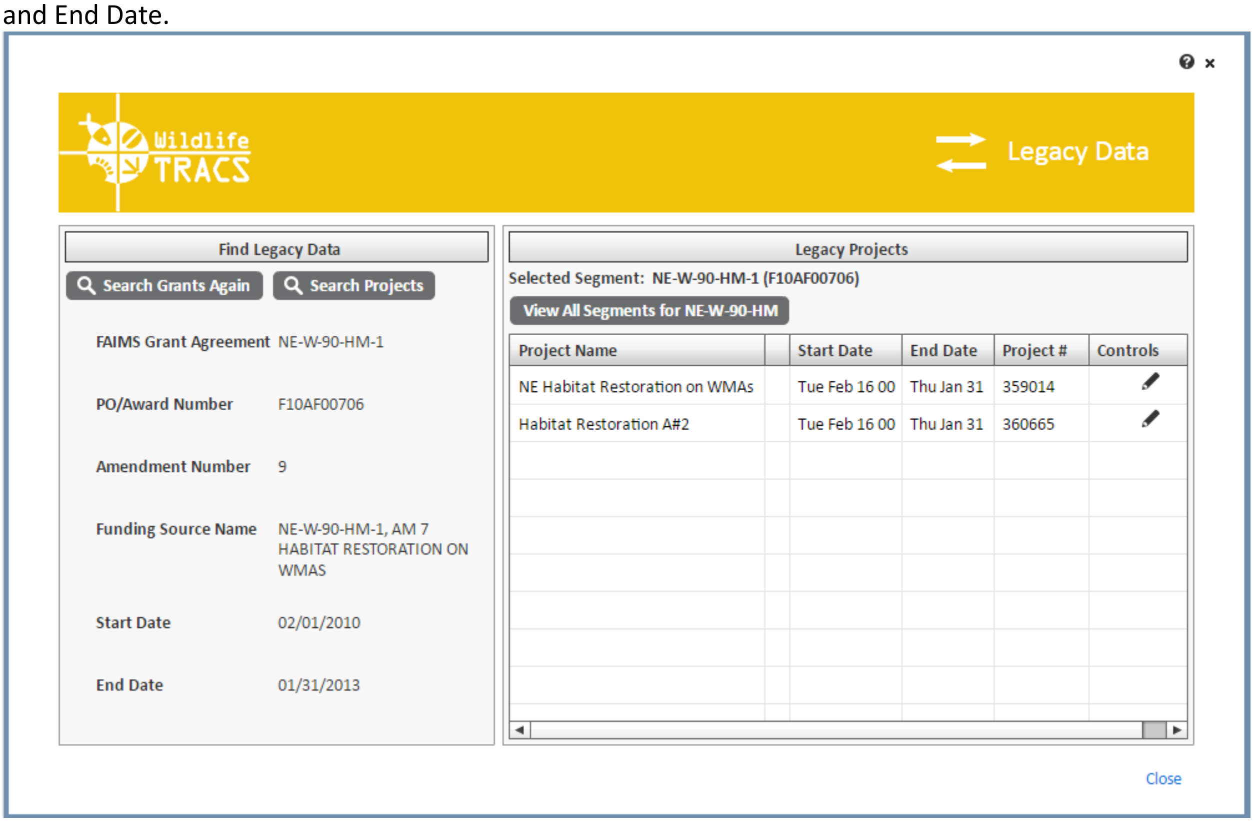
Advanced Search window



4. Select the **Search** button located in bottom left hand corner to open a list of results. Click on the correct funding source to highlight it in blue, then click **Select**.



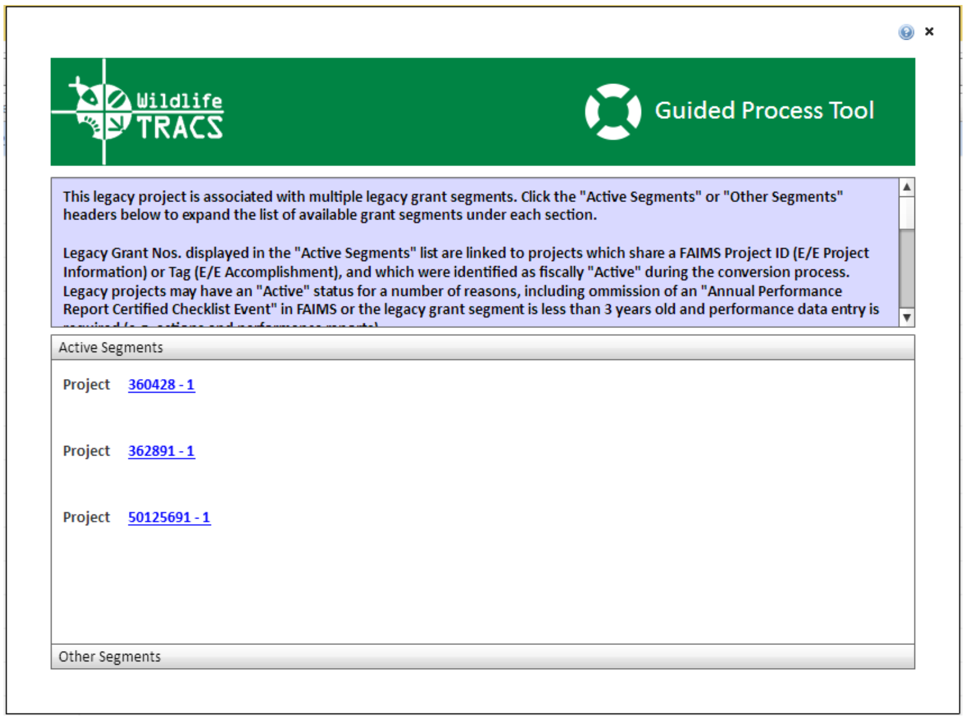
5. The legacy project list will open. On the left side panel, the conversion details will display including the FAIMS Grant Agreement, PO/Award Number, Funding Source Name, Start Date and End Date.



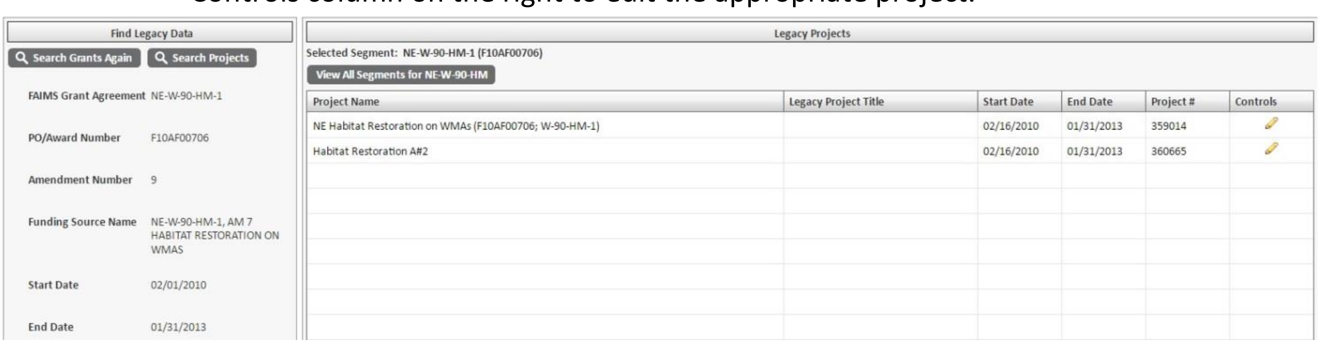
- You may find multiple records or segments associated with your grant. You can sort them by clicking the Start Date column header.

  What is a segment? For multi-year projects, or grants that were amended after approval, additional FAIMS entries were created. If multiple records are associated with your assigned report, it is up to you to find the original grant proposal entered from the list.

Note: The duplicate warning screen is displayed if there were multiple project records in FAIMS with a non-unique Project ID and Name. In this case, the legacy project serves as a placeholder for multiple grant segments. The project with the most recent open grant segment will appear in the Active list.



6. Click the "pencil icon" in the Controls column to the right of the appropriate project/segment to open the Guided Process Tool so you can update it.
   - You may find multiple records or segments associated with your grant. You can sort them by clicking the Start Date column header. Click the "pencil icon" in the Controls column on the right to edit the appropriate project.

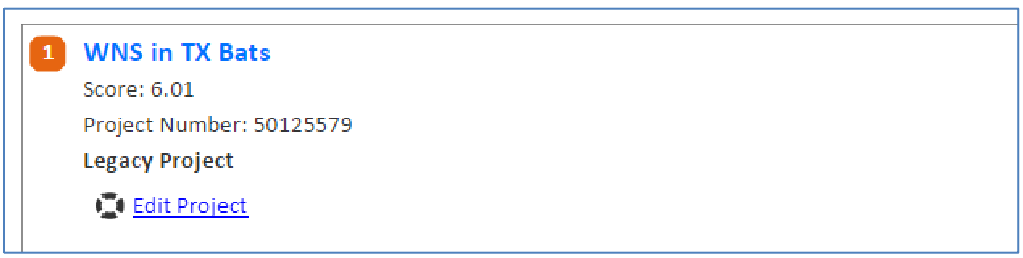


- Based on the multiple entries example listed for the grant above in step 6, the first entry was the initial proposal (Project #359014), and the second entry (Project #360665) was a later amendment. For this example, Project #359014 is the appropriate record.

7. Once the correct project and segment has been selected, proceed to update the record (for more information visit the next chapter on Updating a Legacy Record).

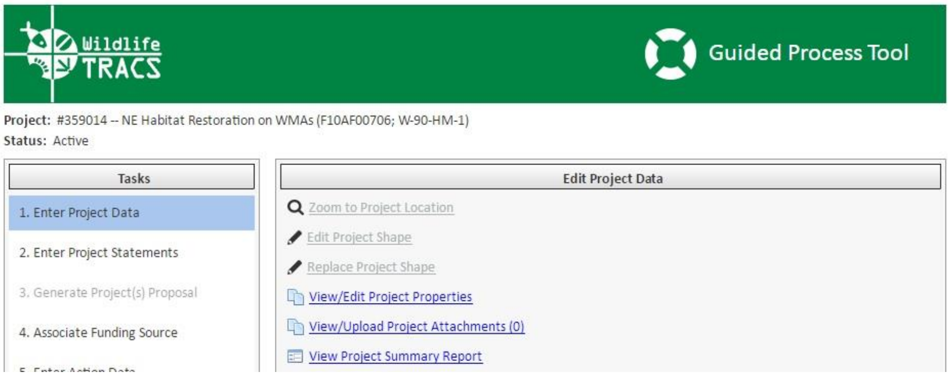
Note: If you are unable to locate the grant or project, it may not have been converted over from FAIMS and may need to be entered manually on the mapper.

- **Search Projects:** This option will only work if you have the project number in TRACS (remember to begin with the Grant Search first). Searching projects requires a TRACS Project ID or Name under the simple search option. Click the Advanced Search button to search by specific parameters, including Agency, Status or Date. Once you find the correct project, click **Edit Project** to open the Guided Process Tool.



24c. Completing a Legacy Project

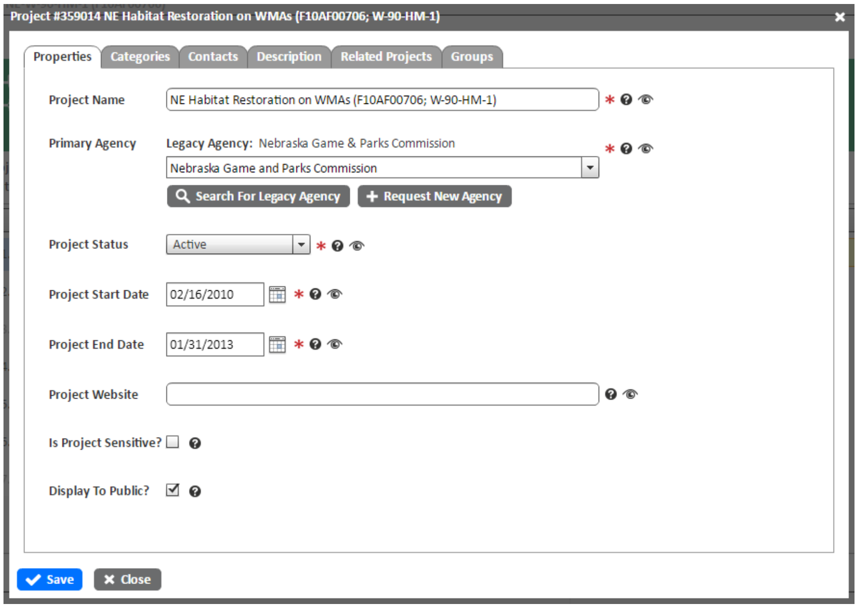
1. Once the appropriate project has been selected from the legacy search, the Guided Process Tool will open. The window should open on **Task 1. Enter Project Data** on the left. Select **View/Edit Project Properties** link on the right.



2. On the Properties tab update the following:

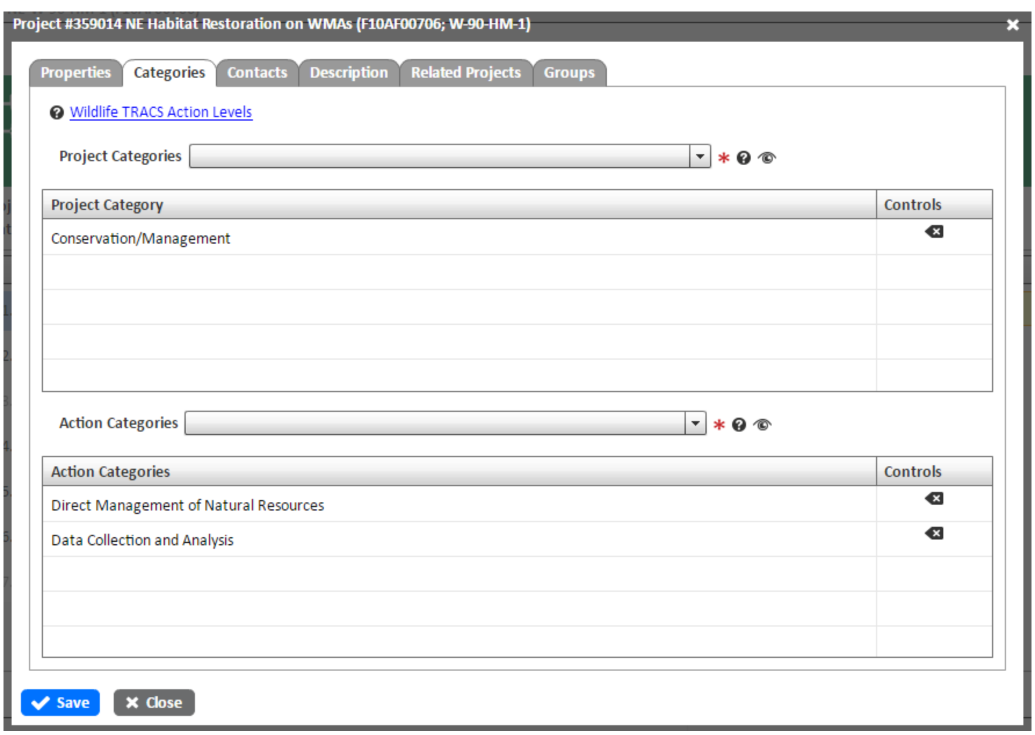
- **Project Name:** Verify that the full project mame is listed and modify if needed. It should have the standard naming convention: a two-letter State/Territory abbreviation followed by a hyphen and the descriptive title. Other identifiers can follow in parentheses including the FBMS number, FAIMS grant number and year.
    - **State Abbreviation - Descriptive Title (FAIMS grant ID/Year identifiers)**
    - *Example: NE – Habitat Restoration on WMAs (F10AF00706, W-90-HM-1)*
    - Note: updating the name using the naming convention is very important because it makes it easier for state and federal staff to find the project in the future.

- **Agency:** Click the **Search for Legacy Agency** button to auto fill the agency (it should match the appropriate State Fish and Wildlife Agency listed above it). Alternately, type the first three letters of the state name into the search box and select the agency from the drop down options. If the agency is not lised, use the Create New Agency button to submit a request to add the agency.
- **Status:** Verify Project Status as Active.
- **Start and End Dates:** Verify the dates are correct and modify if needed.

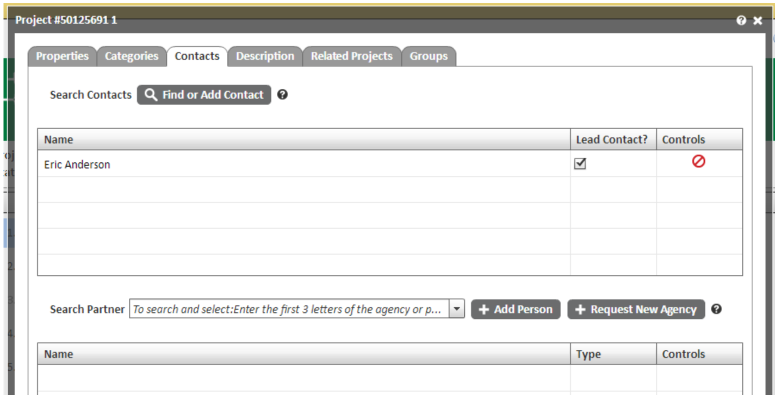


3. On the **Categories** tab, verify that the categories are listed appropriately (may be populated from the legacy conversion). If not, select the Project Categories and Action Categories that are appropriate (select as many as are relevant to the grant report).

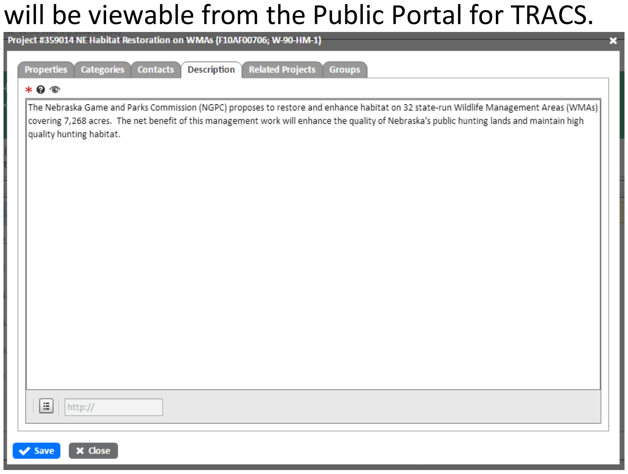
   Categories are used for national reporting and they are very important for data collection and analysis across and within regions. **Note:** The categories and strategies selected on this tab will be the only selections that are available when you get to the action form, so it is very important that you select all applicable categories relevant to the work being reported.



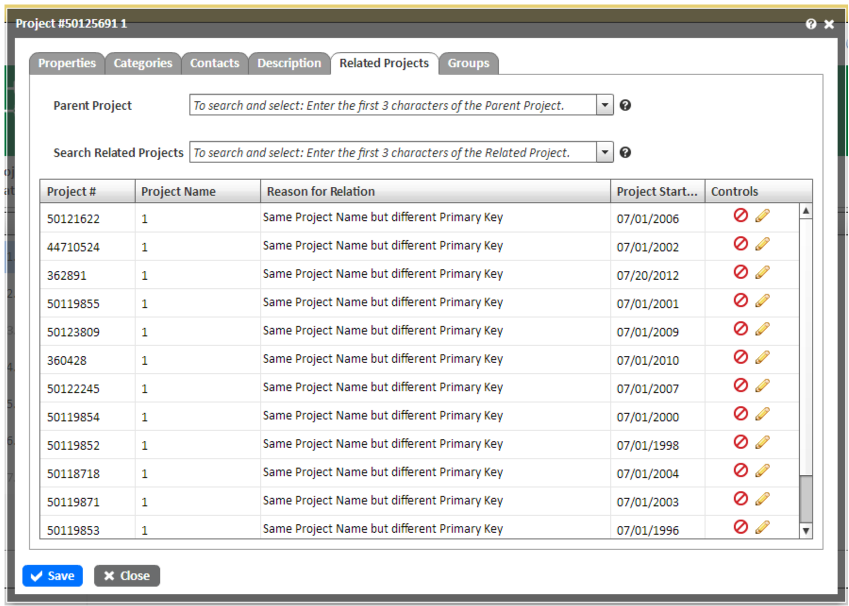
4. On the **Contacts Tab,** verify the contacts are listed correctly. If any are missing, use the **Find or Add Contact** button to add the grant contact(s). If the contact is not found, use the **Add New Contact** button (only if you have their full name, email address, phone number and agency name available). Check the box for the **Lead Contact** (even if there is only one contact). Add partners if listed, such as a partner organization or agency in the bottom section.



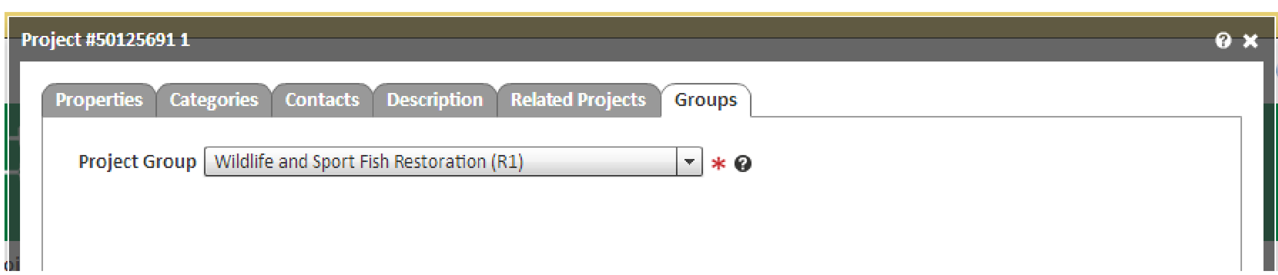
5. Go to the Description tab and enter the description of the project.
   - Information may be available from the performance report for a direct copy and paste into this section.
   - More often you will need to abbreviate or expand an existing paragraph to create a suitable abstract by familiarizing yourself with the **grant objectives and approach found in the original document**. Optionally, look at "**Task 2. Enter Project Statements**" tab on the left and click on the links on the right for "**View/Edit Statement Properties**" and "**View/Edit Project Objectives**".
   - Describe the grant in 2 to 4 sentences (who, what, why, how many, and where) without scientific jargon or acronyms (spell out if possible). Use "elevator speech", in other words a brief high level overview of the project written at a level that a 6^{th} grader would understand.
   - **Note:** The Description entered within this step will be part of the permanent record and will be viewable from the Public Portal for TRACS.



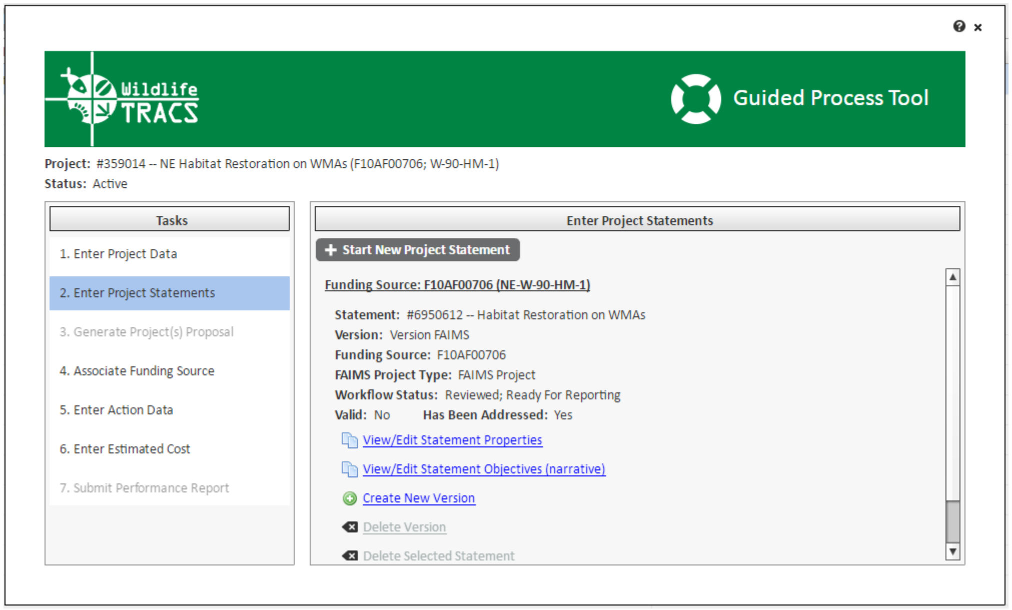
6. **Optional:** fill out the Related Projects tab if there are other projects in TRACS that are related to this one. This tab may be be auto-populated from the conversion from FAIMS.



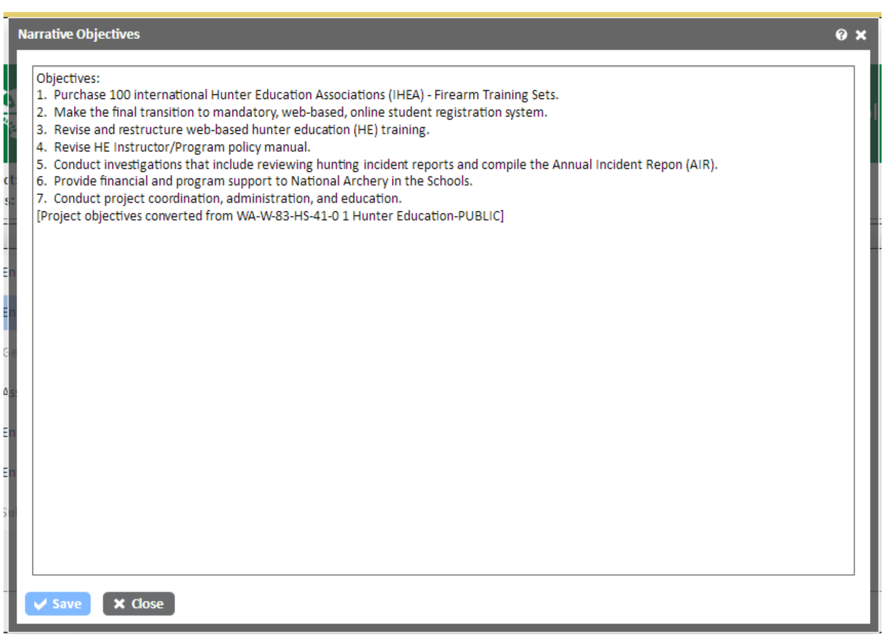
7. The project group will be listed as the regional WSFR group that owns the project.
8. Click **Save** and then click **Close** to return to the Guided Process Tool.



9. **Optional:** Take a look at the Project Statement and Objectives to familiarize yourself with the project details that came over from FAIMS. Although many of the fields will be greyed out or blank and will not be editable, there may be useful details about the project that will help you complete the actions for the project.
    - To view the Project Statements: navigate to **2. Enter Project Statements** in the Tasks Panel. Select the **View/Edit Statement Properties** link in the right pane for each statement. Note: There will be multiple Project Statements for each FAIMS accomplishment (FAIMS Project type will display as "FAIMS Accomplishment").



    - Click on the **View/Edit Statement Objectives (Narrative)** link to see the objectives that came over from FAIMS.

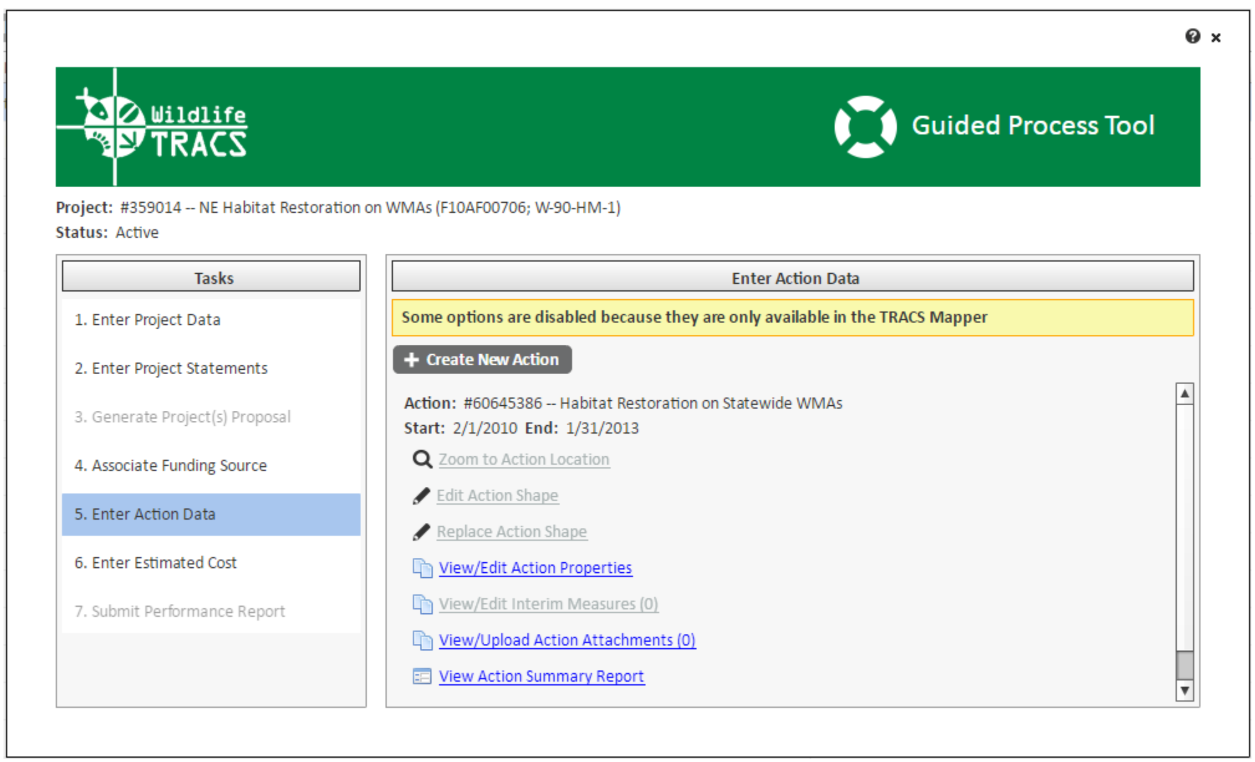


10. **Optional:** Take a look at the **Associate Funding Source** section (should be auto populated from the conversion).

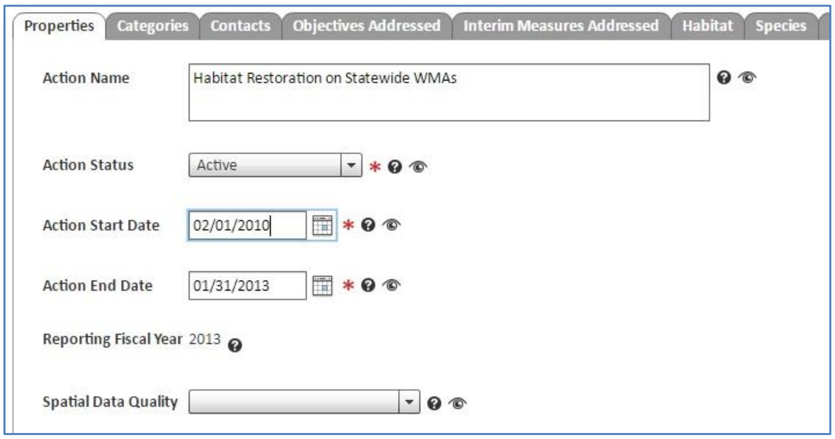
11. Select **5. Enter Action Data** on the left side of the Guided Process Tool. A legacy project must have at least one action.
    - Action Tips:
        - Each action is used to document the work that was done. To determine what types of actions and how many actions need to be created, take a look at the objectives and results in the grant report (and in the Statement Objectives in TRACS)
        - Use the Action Levels Spreadsheet to cross reference the category/strategy.
        - Results and objectives may be combined into one action if they are related to the same type of work (e.g. Habitat Management or Outreach, etc.)
        - If separate costs are listed for each objective/result, they should each be added as separate actions.

    - If available, existing actions for this project may display on the right side (scroll down to look at all of them). For each existing action, click **View/Edit Action Properties** to complete the information.

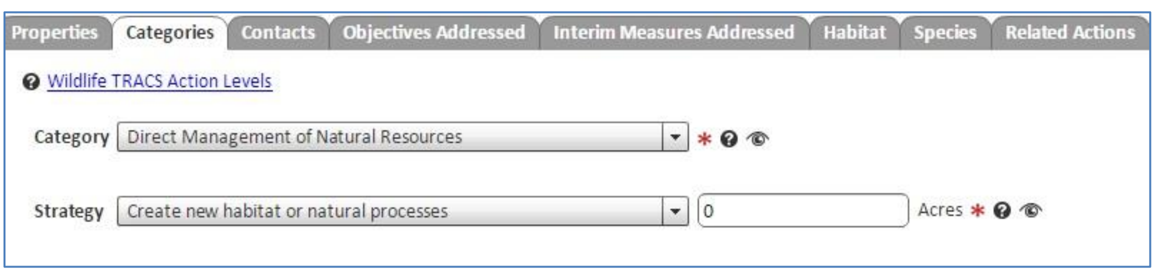
    - If an action is missing, click the **Create New Action** button. Create as many actions as required for capturing the work reported by the grantee.



12. For each action, verify and fill out any missing information in the required fields. On the Properties tab fill out:
    - **Action Name:** should summarize the on the ground activities. In some cases, it may be appropriate to utilize the Project name as the Action name. In other cases, where multiple Actions are needed, a unique Action name will need to be created that reflects the type of work performed (see example in the screenshot below).
    - **Status**: leave as "Draft" or "Active" until all of the data has been entered (then change the status to "Completed").
    - **Action Start and End Dates**: enter the specific dates if available, otherwise use the overall project dates.



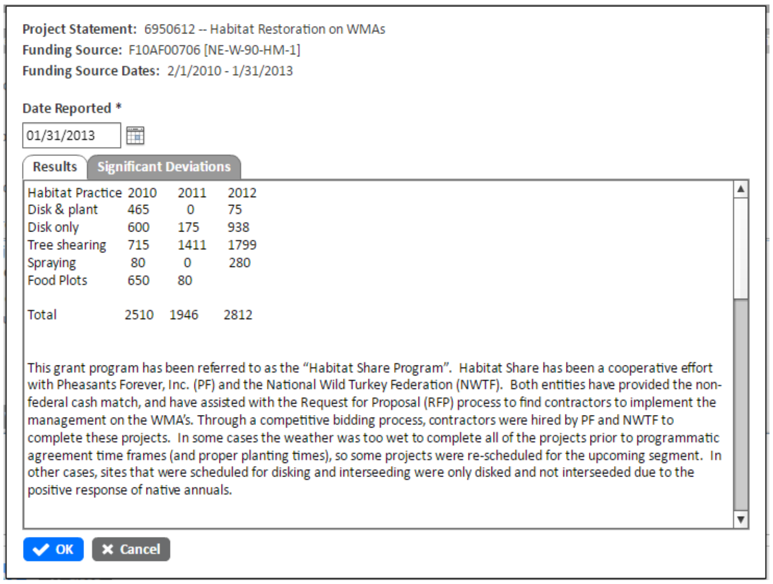
13. On the Categories tab, fill out the following:
    - **Category and Strategy:** Select from drop down menus
        - Categories and Strategies will be carried over from data entered on the Project Properties form.
    - If a box appears to the right of the strategy, enter the value if possible (or enter a 0 or 1 as a default).



14. Click the **Contacts** Tab and verify the contacts are listed correctly as the project leader(s) and update if needed.

15. Click on the **Objectives Addressed** tab.
    - Click on the **Project Statement** drop down and select the appropriate Project Statement.
    - Click on the **Enter Progress** button to enter the results.
    - **Date Reported**: enter if available or use the end date of the project.

- **Results**: fill in the results information for this action, which can be copied and pasted directly from the performance report.
- **Significant Deviations**: if the report contains this information, copy and paste it to this tab.
- Click the **Add** button to save the results.



16. Fill out the habitat and/or species tab ONLY if applicable. For more information, visit the Habitat and Species chapter.

17. Click **Save** and **Close** to return to the Guided Process Tool.

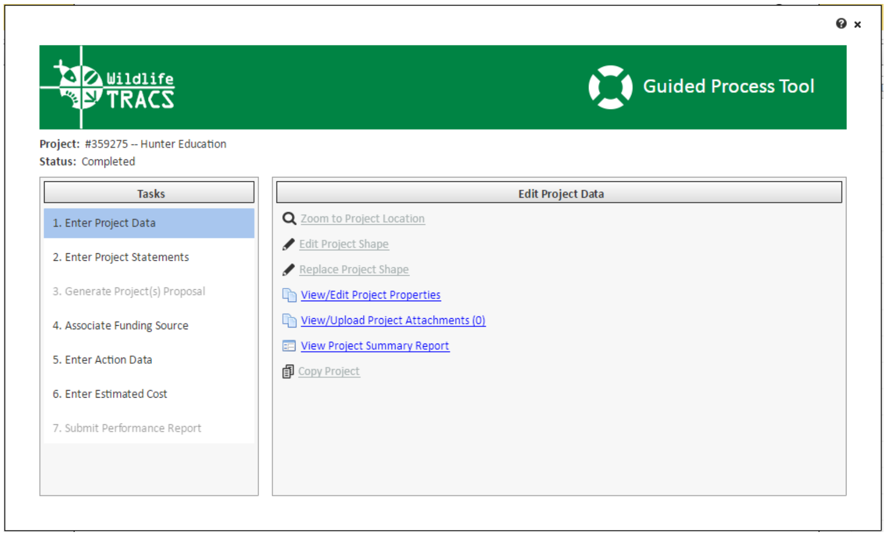
18. Repeat steps 11-17 to verify or add all actions.

19. After adding all of the actions, go to task "**6. Enter Estimated Costs**" on the left side of the Guided Process Tool. Click on the "**View/Edit Project Estimated Cost**" link on the right.
    - If the performance report includes financial information related to Action Categories, **fill in the dollar amounts for each action** (see screenshot below). Tip: look for sections in the grant document labeled "budget narrative" or "project costs").
    - If costs are not listed on the report, click the **Split Proportionately** button. This will evenly split the costs across all actions.
    - If the non-federal match is over and displays a red error message, check the **Overmatch** button.
    - Click **Save** and **Close**.

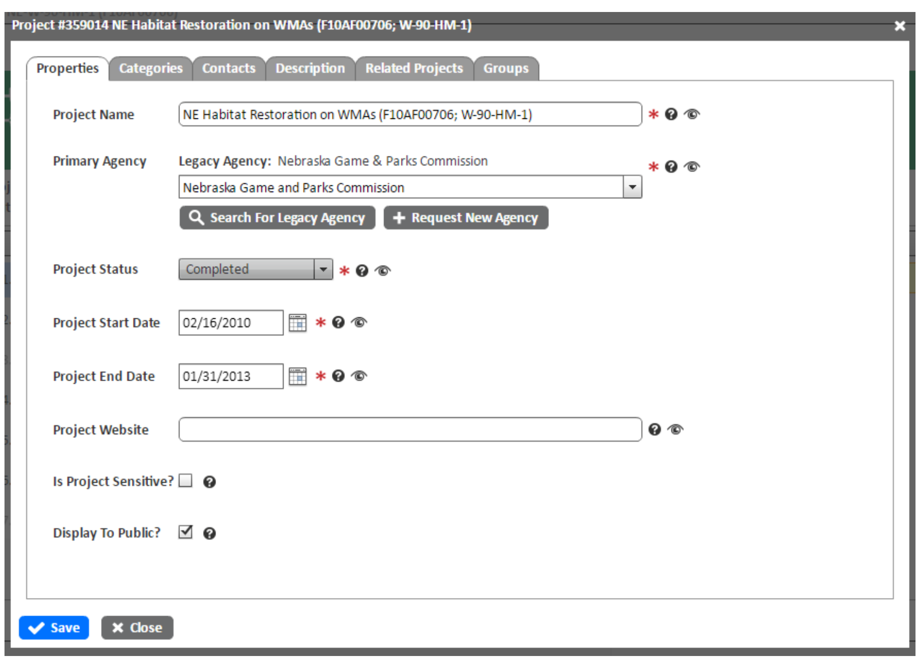
Tip for Advanced Users (contact your supervisor for more information):

- If the report does not differentiate the WSFR federal costs from the non-federal match dollars, use the percentage rule of thumb to calculate the federal/non-federal amounts from the total.
    - <u>Grant Programs except SWG:</u> 75% federal and 25% non-federal.
    - <u>SWG (State Wildlife Grant) Program:</u> 65% federal and 35% non-federal. (In some cases, the grant may list a different split that should be used such as 50/50)

20. Return to task “**1. Enter Project Data**” on the left and click on “**View/Upload Project Attachments**”. Save an electronic copy of the grant proposal/report to your computer and upload it as a project attachment. Then delete the local copy on your computer for security purposes.



21. Then click on the “**View/Edit Project Properties**” link on the right.
    - On the Properties tab, change the **Status** to “**Completed**” from the drop-down menu.
    - Click **Save** and **Close**. Then close out the project by clicking on the x in the upper right corner of the Guided Process Tool.

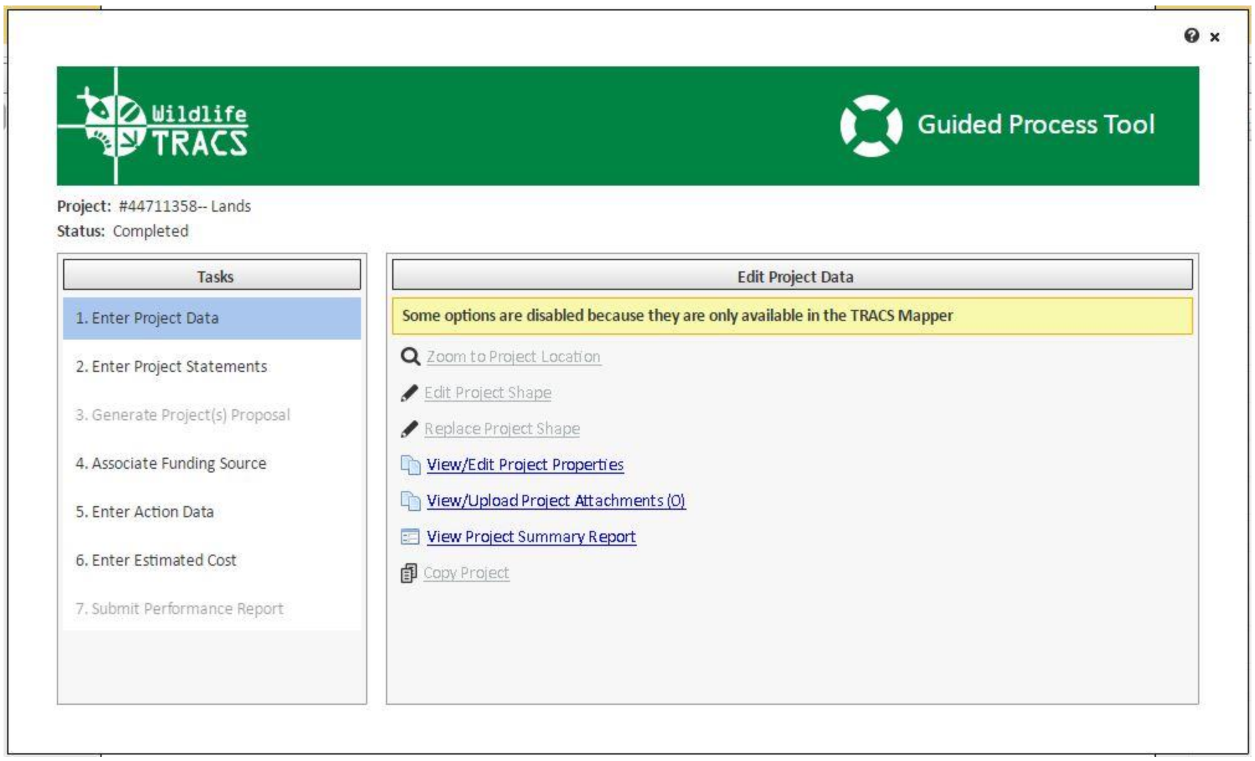


Updating Legacy Land Records

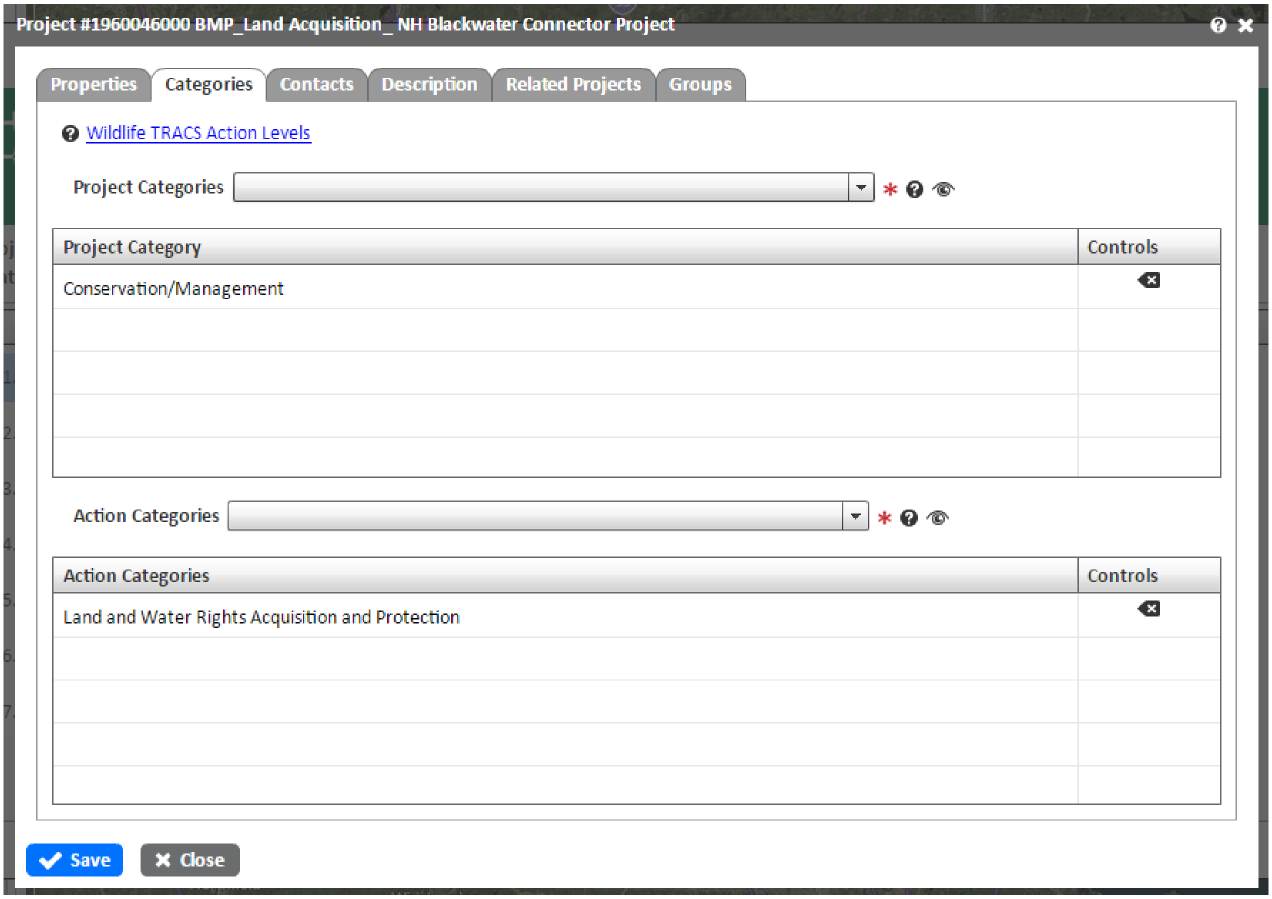
This sub-chapter just goes through the additional steps required to update the Land Record Form in a legacy project. This step is required for projects with land, water or mineral rights acquisitions.

Please reference Chapter 16: Lands Data; <u>however keep in mind that the steps to update a Legacy record will vary slightly because legacy records do not contain project or action polygons</u>.

1. On Task 1: Enter Project Data, select **"View/Edit Project Properties"**.

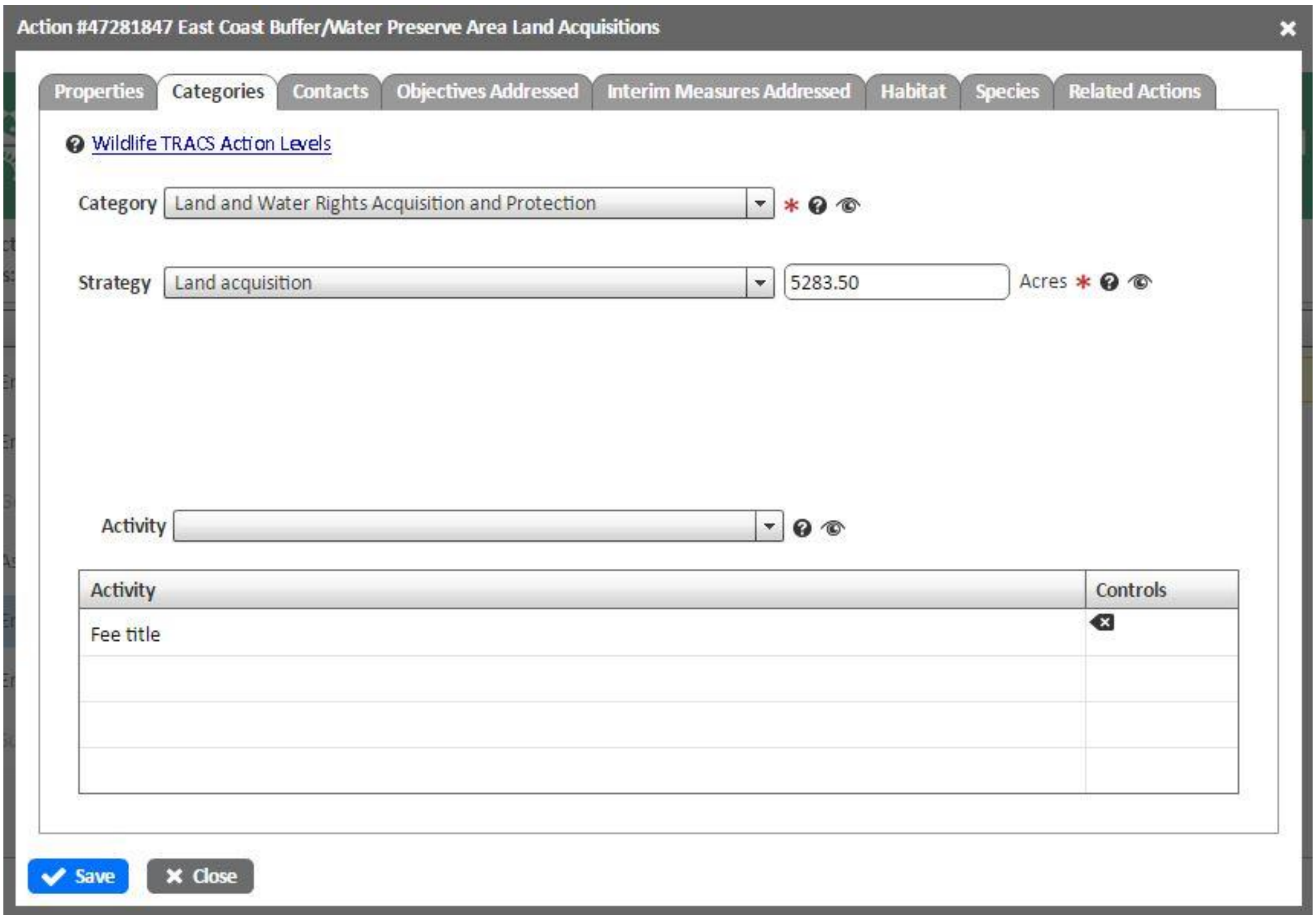


2. On the Categories tab, you MUST select **Land and Water Rights Acquisition** as an Action Category (in the lower half of the screen). This generates a Land Record form that needs to be filled out for the Action related to the land, water or mineral rights acquisition. Select any other applicable project or action categories if needed.

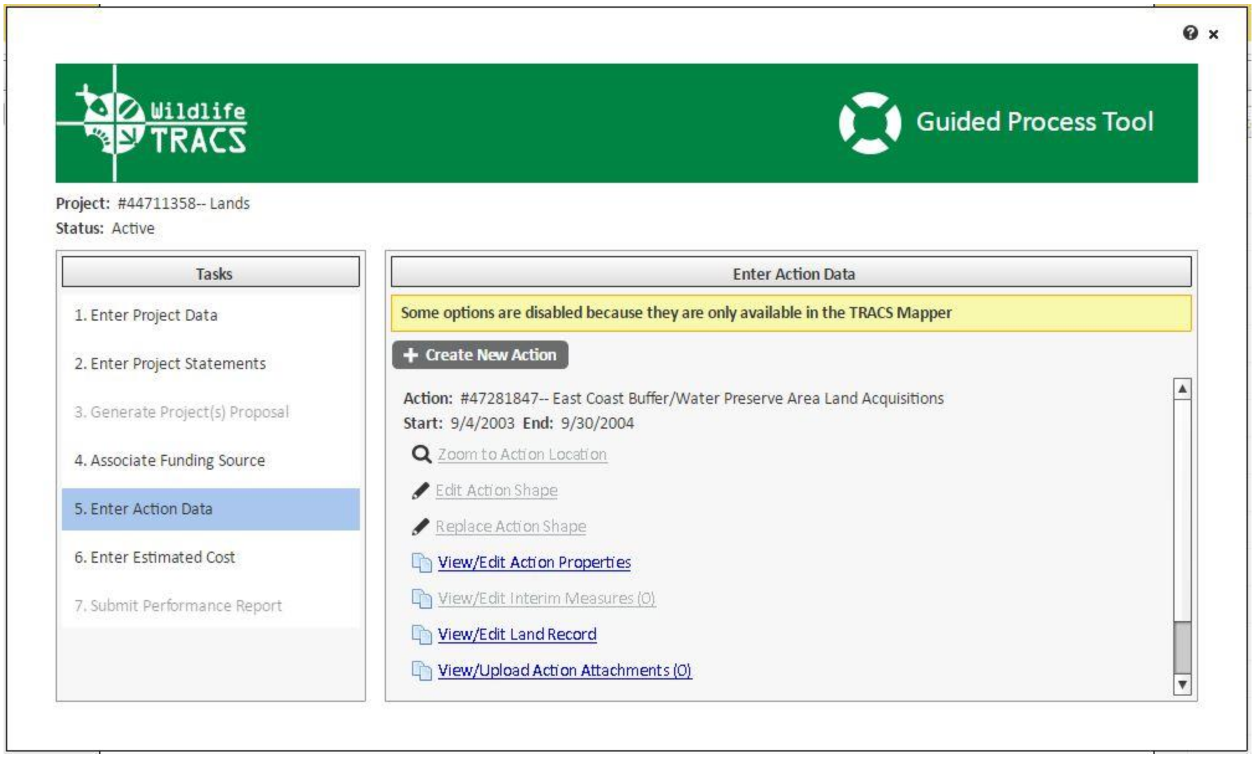


3. Create or update the action used to document the land, water or mineral rights acquisition.

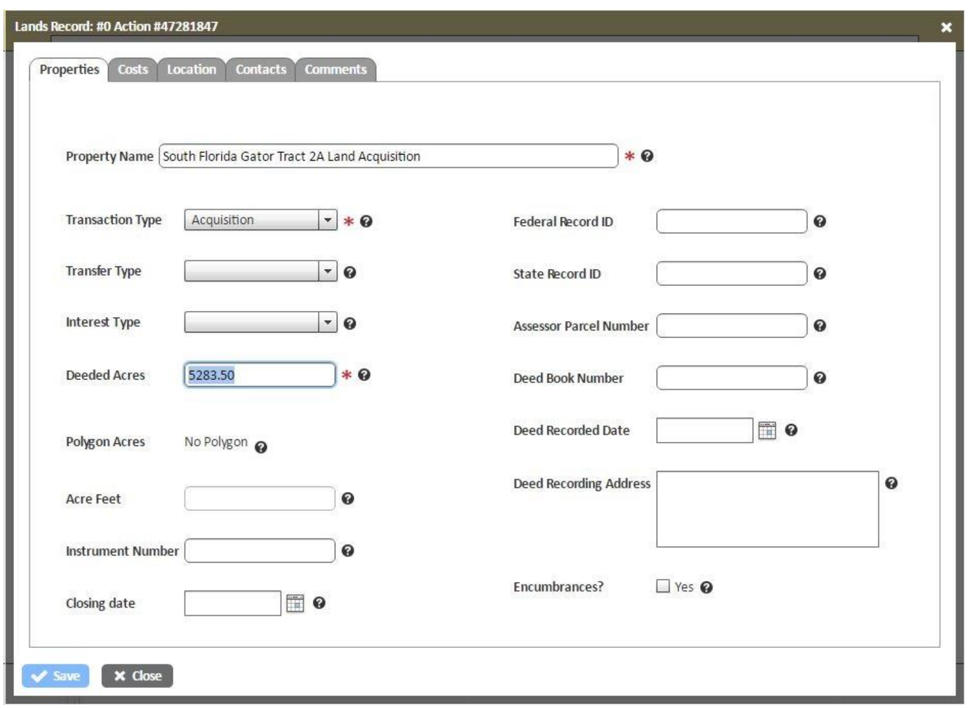
- On the Action Form - Categories tab, make sure to select "**Land and Water Rights Acquisition**".
- Tip: If the Categories tab is grayed out, the project status will need to be changed from "Completed" to "Active" first. Remember to change the status back to "Completed" once the Legacy project updates are complete.
- Select the appropriate strategy and enter the acres or acres feet as applicable. Select the activity if available.



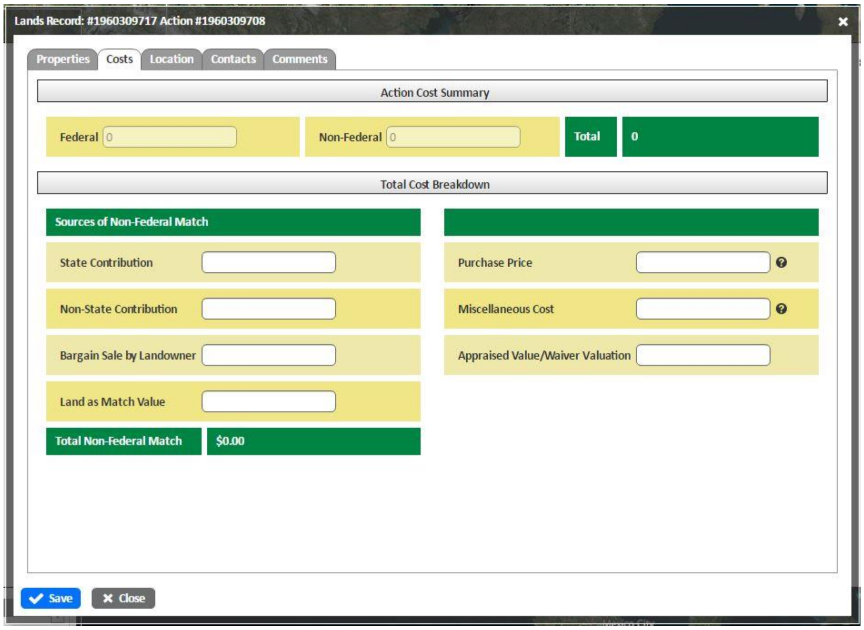
4. After saving and closing the action, select the "**View/Edit Land Record**" link below the action.



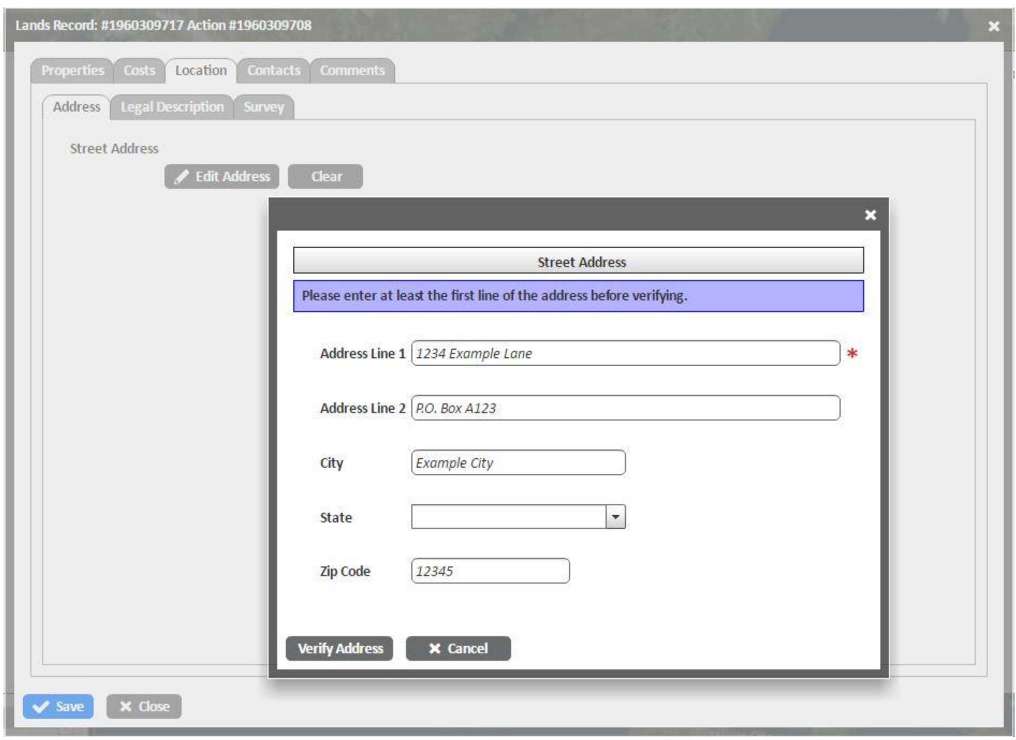
5. On the Land Record form Properties tab, fill out all required fields and any additional fields that are applicable. Tip: Hover your mouse over the question mark icon to the right of a field to find out more about that field.



6. Fill out the Costs tab ONLY if costs are available for the land, water or mineral rights acquisition. (Note: the Estimated Costs on the Guided Process Tool must be filled out first before entering this section).

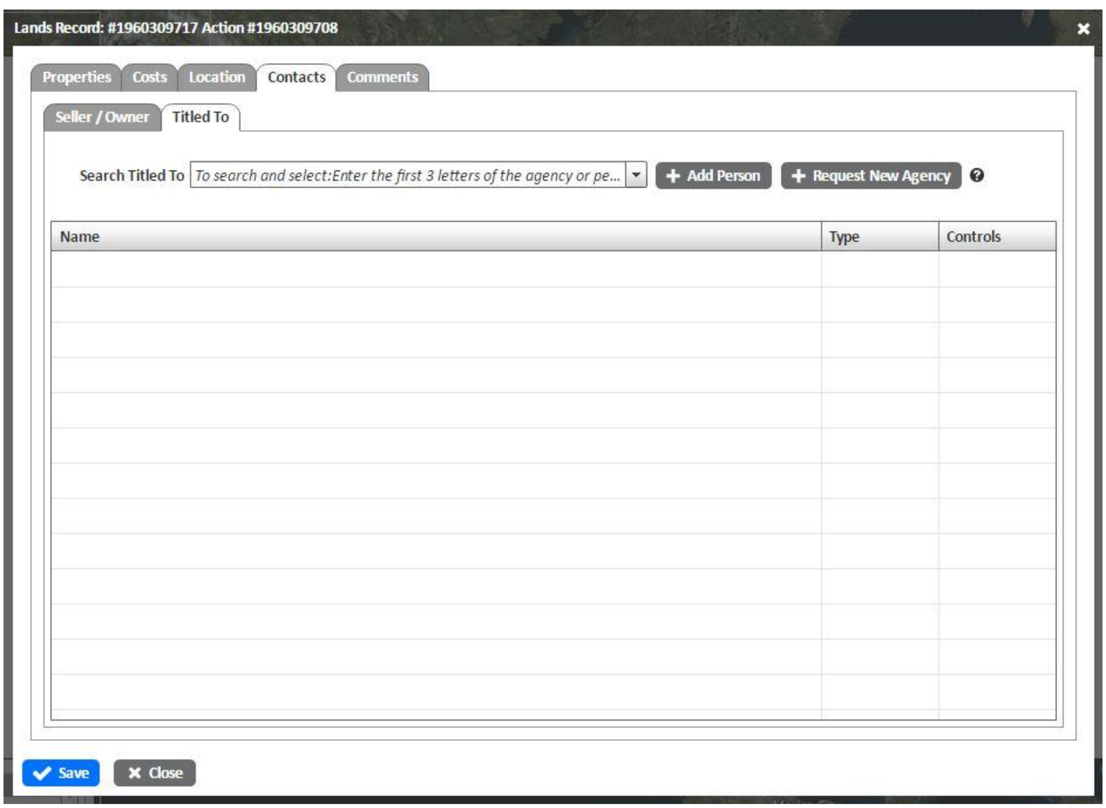


7. Fill out the Address tab, Legal Description tab and Survey tab if applicable. Note: To enter a street address, click the **Edit Address** button and fill out the form, then click **Verify Address.** The system sends the address out for verification and returns results. If the address is not found, enter the address details in the comments section instead.



8. Fill out the Contacts tab if applicable. The **Seller/Owner** tab has a free text box allowing you to enter their name and contact information if available.

The **Titled To** tab has a search box where you can enter the first three letters of the agency or person's name. The **Add Person** and **Request New Agency** buttons are available if needed.



9. Fill out the Comments tab. The **Acquisition Purpose/Change in Purpose** tab is required. The purpose of the comment field is to specifically identify the purpose of acquiring the land, water or mineral rights. This information can be copied and pasted from the Project Statement Need field but may need to be further refined. The **Comments** tab can be used to store additional information.

10. Click Save and Close. After you finish updating the project, remember to change the status to "Completed".

Creating a Legacy Record on the Mapper

Most Legacy Projects from the old FAIMS system were converted over into TRACS as projects available to be viewed and updated using the Legacy module. However, some projects did not have enough data entered into FAIMS to be brought over into TRACS.

This sub-chapter just goes through the steps needed to create a project "from scratch" that does not have an existing legacy record in TRACS.

****These steps should only be taken after verifying that the Legacy record does not exist in TRACS (see the chapter on Locating a Legacy Record).****

For information about how to create a project on the mapper, please reference Chapters 1-10 and the videos in the TRACS Basic Course.

Follow the steps in Chapter 1 through Chapter 10 to enter the project on the mapper. Below are additional tips needed to create a legacy project on the mapper.

- If a shapefile, map or location is available for the project or action area, create it on the mapper. Otherwise select the statewide boundary. Keep in mind the accuracy of the project polygon acreage is especially important for land acquisition projects.
- Complete the approval steps at both the Proposal and Final Performance Report dates.

Lesson 25: Backlog Projects

What are backlog projects?

Backlog projects refer to past projects that have been approved but have not yet been entered into TRACS.

How do backlog projects relate to Legacy projects?

Legacy projects are a subset of backlog projects from prior to 2012 that were a part of the FAIMS conversion (see the Legacy chapter for more information). NOTE: If a grant had no project or accomplishment data in FAIMS, the grant level information was not converted to TRACS.

How can I pull a list of backlog projects?

Open the Workflow Manager and select the Performance Report Workflow tab. To pull a list of backlog projects for your state, create a filter to search for "Unassigned" grants (for more information visit the Workflow Manager chapter). The "Unassigned" filter pulls a list of grants from FBMS that do not have an associated project and may need to be updated or entered in TRACS.

How do I update or enter a backlog project?

Backlog projects not in the Legacy Module are entered in the standard format using the Guided Process Tool from the mapper. Contact your WSFR coordinator for more information.

Search for backlog projects

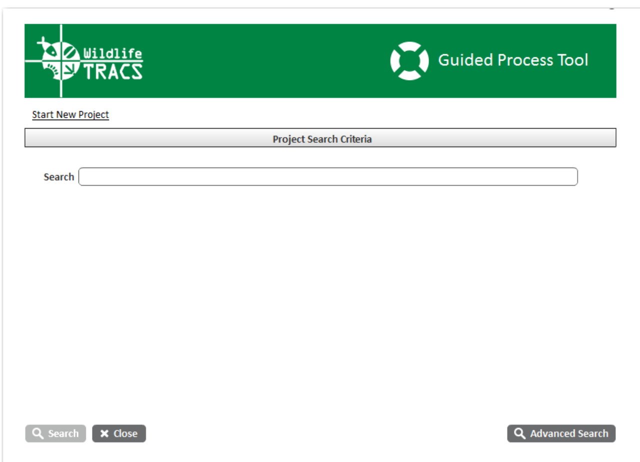
Before creating a project from scratch always complete a thorough search to check if the project already exists and needs to be updated instead.

You can search for the project using the legacy module (for projects with dates from 2012 and prior) and use the Guided Process Tool (GPT) to search for all other projects. Note: The GPT search displays both legacy and non-legacy projects.

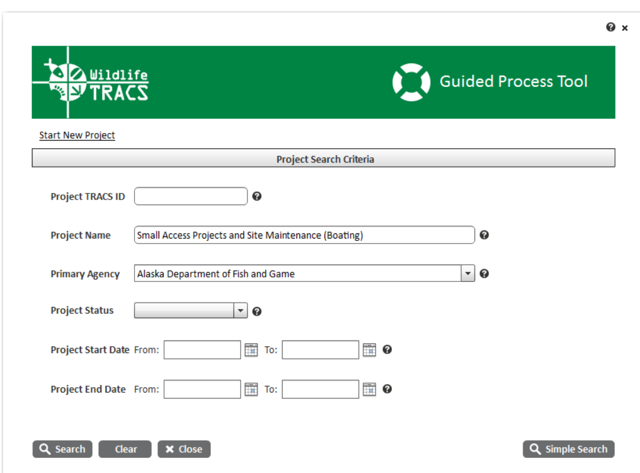
Search Tips:

1) Open the Guided Process Tool. In the Search box, try searching for the grant number with and without the state abbreviation (e.g. F-10-29 and AK-F-10-29), study number (ex. C-1-2) and/or project title (Southeast Regional Salmon Research Coordination).

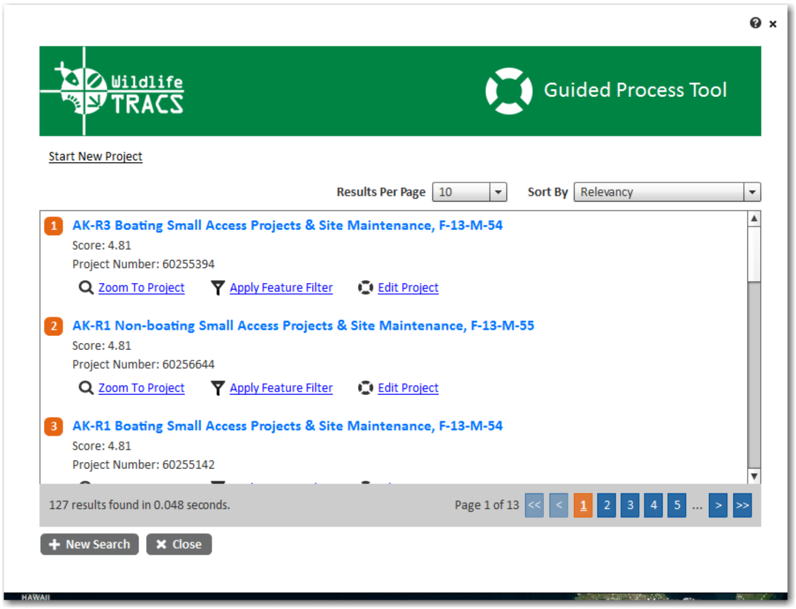
2) If the project is not found, select "Advanced Search".



3) Type Project Name as shown on the Performance Report and Agency Name (e.g. "Alaska Department of Fish and Game").



4) Look through the results. If you find correct project to update, click "Edit Project" below it.



Tip: Many projects look very similar, so verify that you have the correct one by checking that the dates title and grant information matches your grant document. When you update these projects, make sure to update the project name to include the full project name, grant number and study number to make it easier to find again.

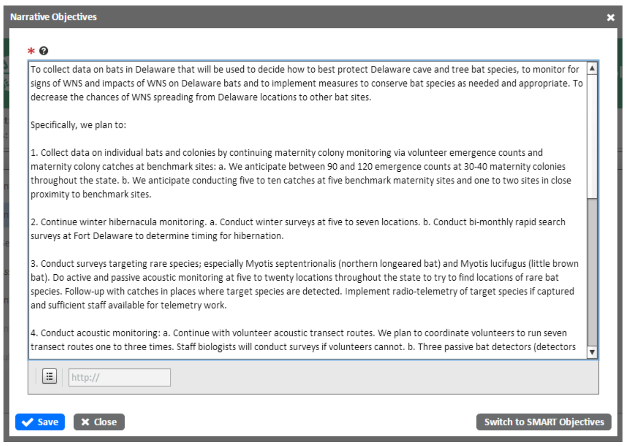
5) If you have not located the correct project after a thorough search, then create it from scratch on the mapper by opening the Guided Process Tool and selecting "Start New Project", then follow the steps in chapters 2-10.

Enter narrative objectives and actions

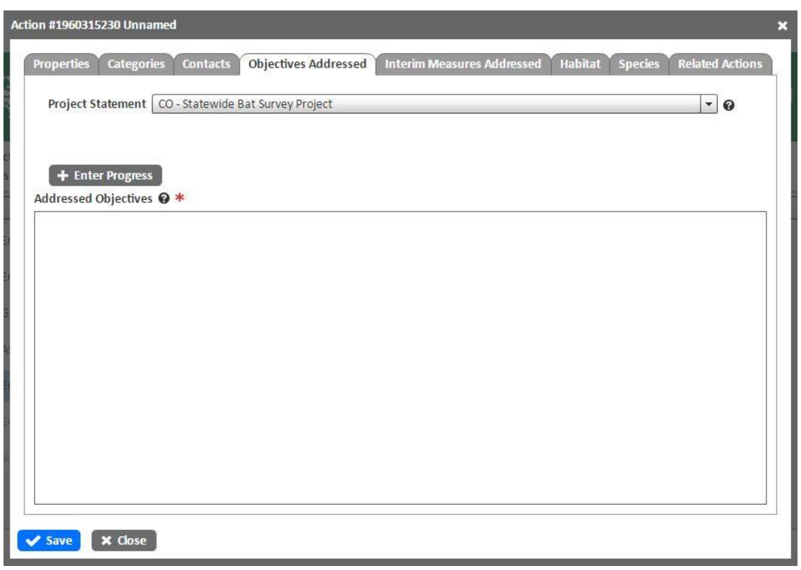
Backlog projects often have narrative objectives and actions. If possible, convert the narrative objectives to the SMART objective format.

If you need to use the narrative format, follow the steps below:

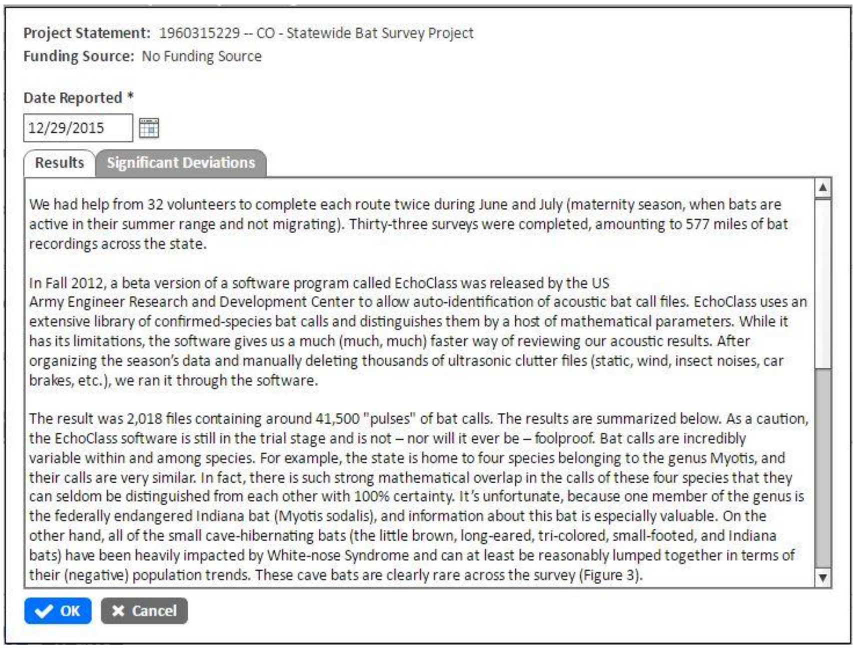
- From the Objective window, select the **Create Narrative Objectives** option and fill out or copy/paste all objectives into the window (for more information, see [Chapter 5 Entering Project Objectives]).



- Create one or more actions to demonstrate the work that was done (for more information, see [Chapter 8 Mapping and Entering Actions]).
  - On the "Objectives Addressed" tab, select the Project Statement from the drop down and select the **Enter Progress** button.



- Fill out the date reported and enter the results. Fill out the significant deviations tab only if applicable. Click **Add**.
- **Tip:** Use an electronic copy (PDF/Word) of the report to copy & paste the text into the results box. The report(s) and supporting documentation (such as maps, photos, charts, documents, etc.) may be attached at the action or project level (for more information visit the [Adding Attachments chapter]).

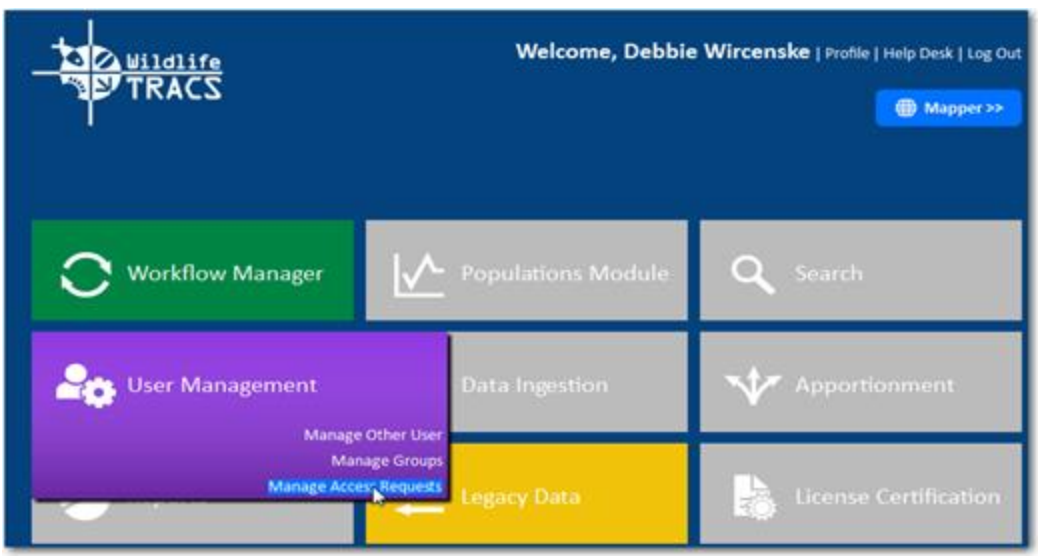


Lesson 26: User Administration

The User Administrator is the only role in TRACS with permission to approve new user registrations. Each state and WSFR region has an assigned User Administrator that has been appointed by their director or agency/division head. For more information on the appointment process or if you have questions about the status of your registration request, please contact your User Administrator or the tracs-helpdesk@fws.gov.

1. Log into the TRACS live site: https://tracs.fws.gov/data_tracs/dt/dashboard. Enter your username and password and click the Agree and Log In button.

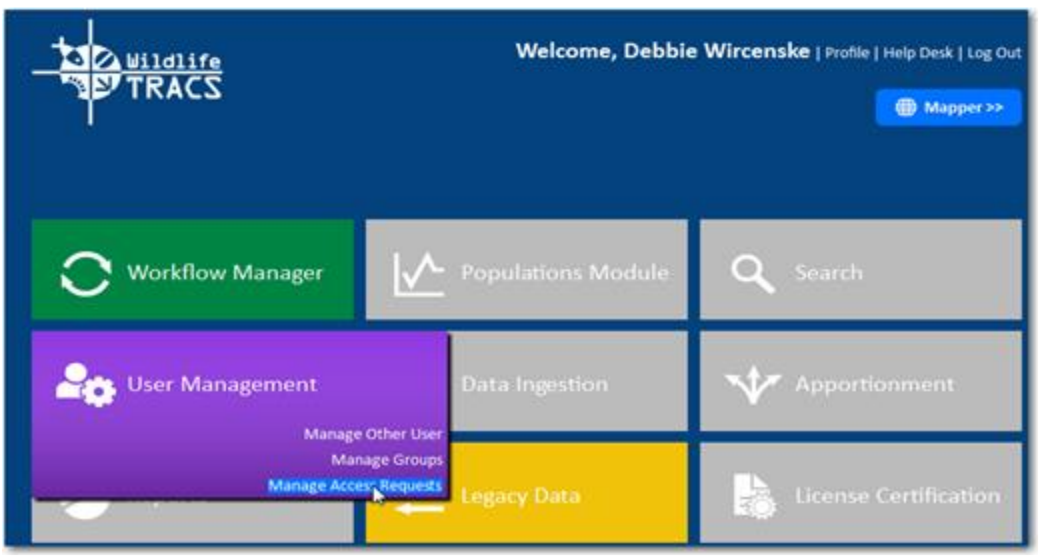
2. From the TRACS Dashboard, click on **User Management** to view a nested sub-menu to the right (this module is only accessible to User Administrators). The User Management Module contains three links:
   - **Manage Other Users:** edit other users profiles and permissions
   - **Manage Groups:** create, edit or delete groups and sub-groups
   - **Manage Access Requests:** displays a list of users who need to have their access requests approved



Manage Access Requests

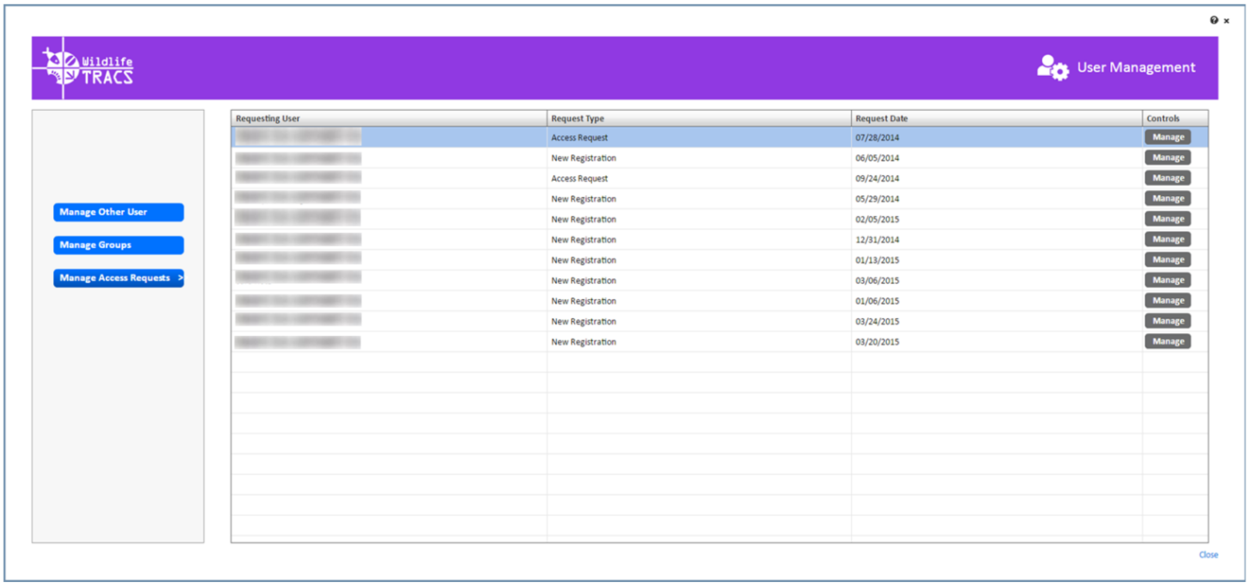
When a new user registers for access to the live TRACS environment, their User Administrator for their agency/division/region will receive an automated email from TRACS with the subject "**New TRACS Registration Request Waiting for Your Approval**". All users with access to TRACS can edit their own profiles and submit requests for additional access for themselves. These requests are also sent to the User Administrator via an automated email from TRACS with the subject "**New TRACS Access Request Waiting for Your Approval**". As the user administrator, you will need to log in to TRACS to review and approve access requests within your assigned agency/division/region.

From the TRACS Dashboard, click on **User Management** to view a nested sub-menu to the right (this module is only accessible to User Administrators). Select **Manage Access Requests** to displays a list of users who need to have their access requests approved

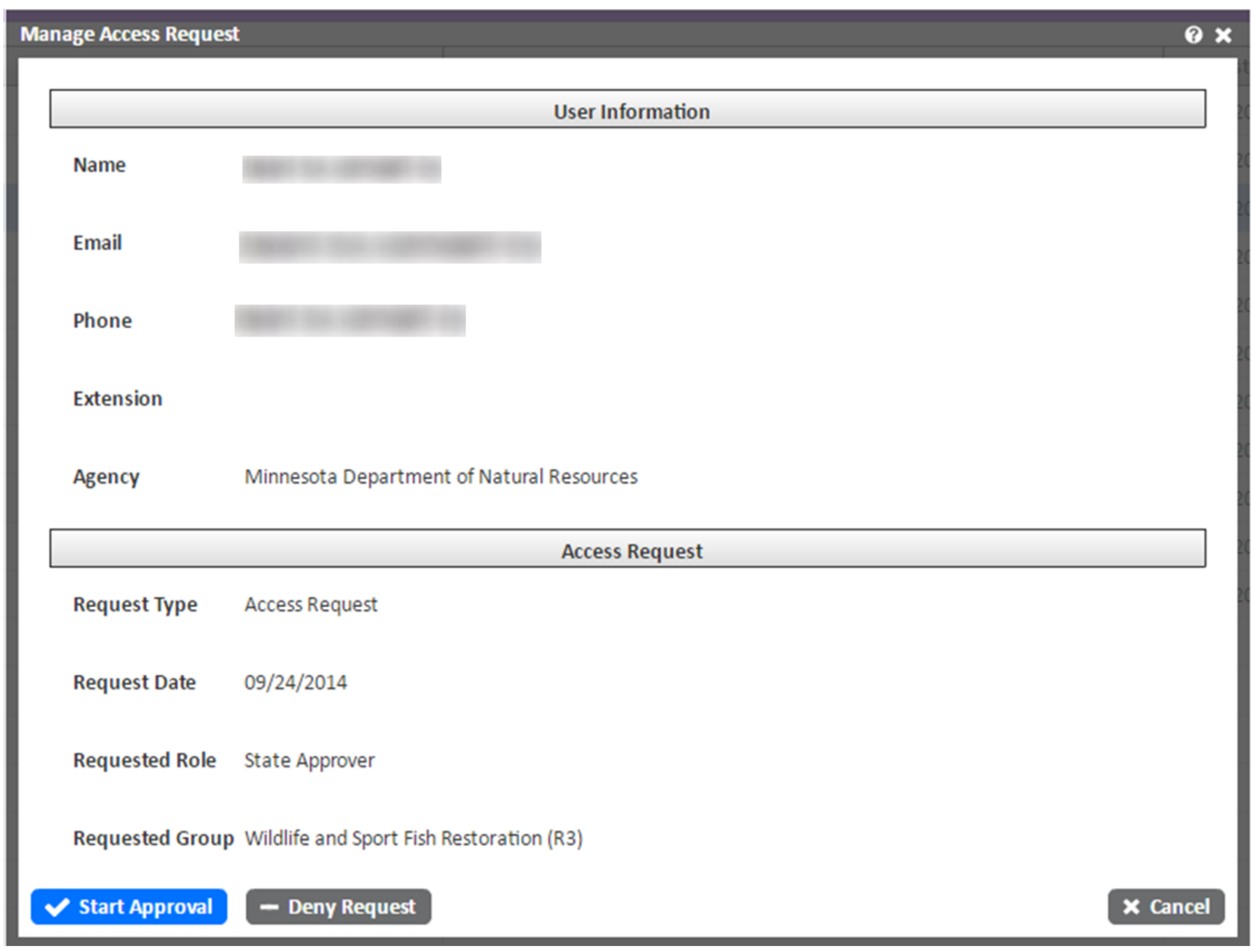


Select **Manage Access Requests** to open the User Management window. A list of requesting users displays for the administrators identified for their division/agency/region. The request type will display as either **New Registration or Access Request**.

For each one, click on the **Manage** button located on the right side under the **Controls** column.

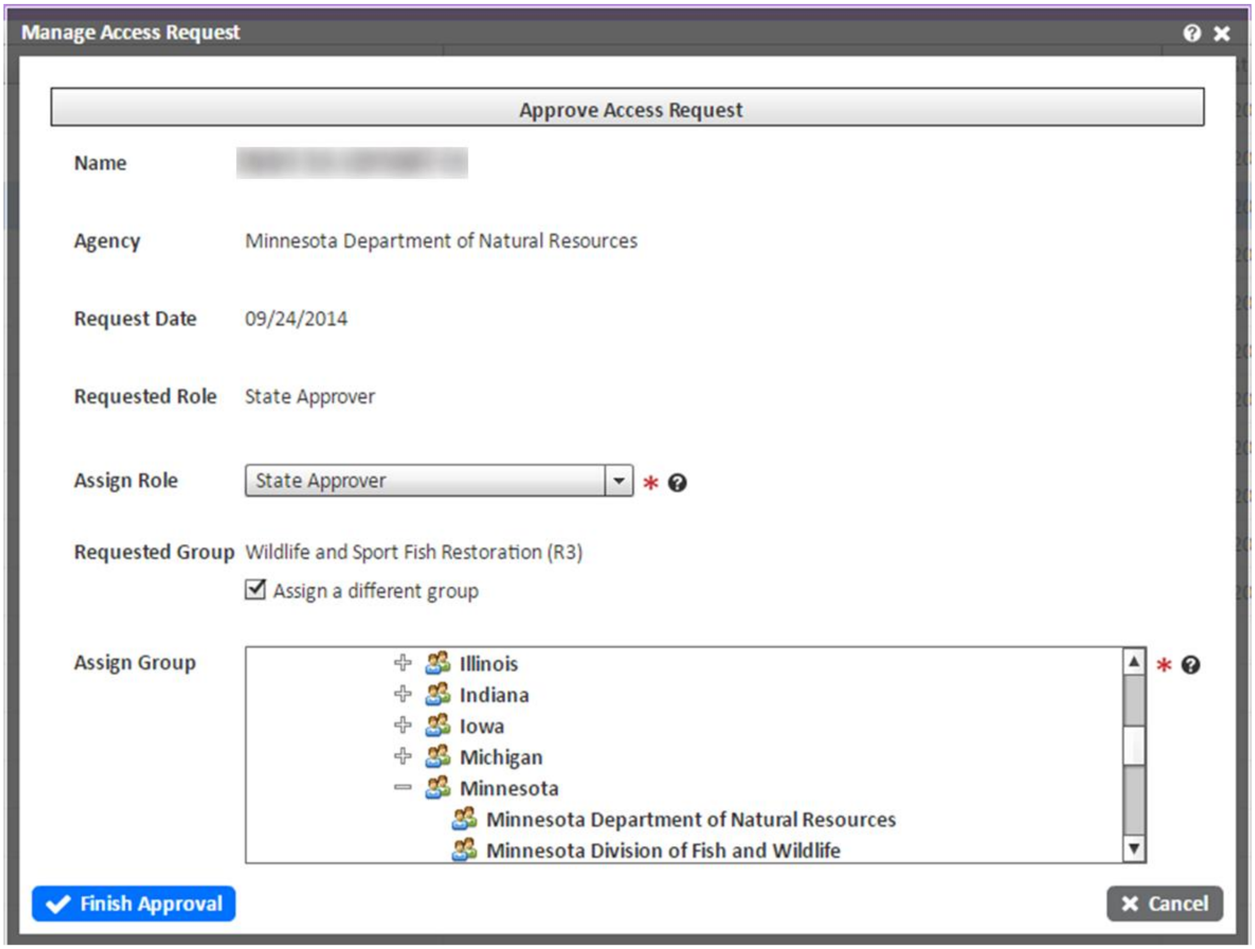


The Manage Access Request form opens and contains the user profile information and access level requested by the user. Click the **Start Approval** button on the bottom left of the form.



On the Approve Access Request form, verify that the user's **Requested Role** and **Requested Group** are correct. Typically the agency listed for the user should match the requested group.

- <u>If the Requested Role is incorrect:</u> select the correct role from the **Assign Role** drop down menu.
- <u>If the Requested Group is incorrect:</u> check the box to **Assign a different group**. Then select the correct group from the **Assign Group** box by clicking on the plus sign (+) to expand the agency lists below TRACS.
- Note: The User Role will default based on the Agency Type. The default role for users associated with a federal agency is Federal Reviewer. The default role for users associated with a state or tribal agency is State Editor.



Once the request has been reviewed (and corrected if needed), click the **Finish Approval** button and click **Ok**. The requesting user will receive a system notification email with the subject “TRACS Registration Request Approved”.

Role and Group Assignment

Each user is assigned to a user group (agency/division/region) and user role (permissions within their assigned groups). The **Approve Access Request** form allows a User Administrator to assign or change role(s) and groups for a user request.

The **Requested Role** is the default role assigned to user request. The default role is identified from the **Agency Type** selected by the user when registering for access to TRACS. The default role for users associated with a federal agency is **Federal Reviewer**. The default role for users associated with a state or tribal agency is **State Editor**.

- The **Editor** role allows an end user to create and edit plans, projects, and actions within their assigned group and initiate workflow actions.
- The **Reviewer** role enables an end user to create and edit plans, projects and actions within their assigned group and complete review functions in the workflow.
- The **Approver** role allows an end user to create and edit plans, projects and actions within their assigned group and complete approval functions in the workflow.

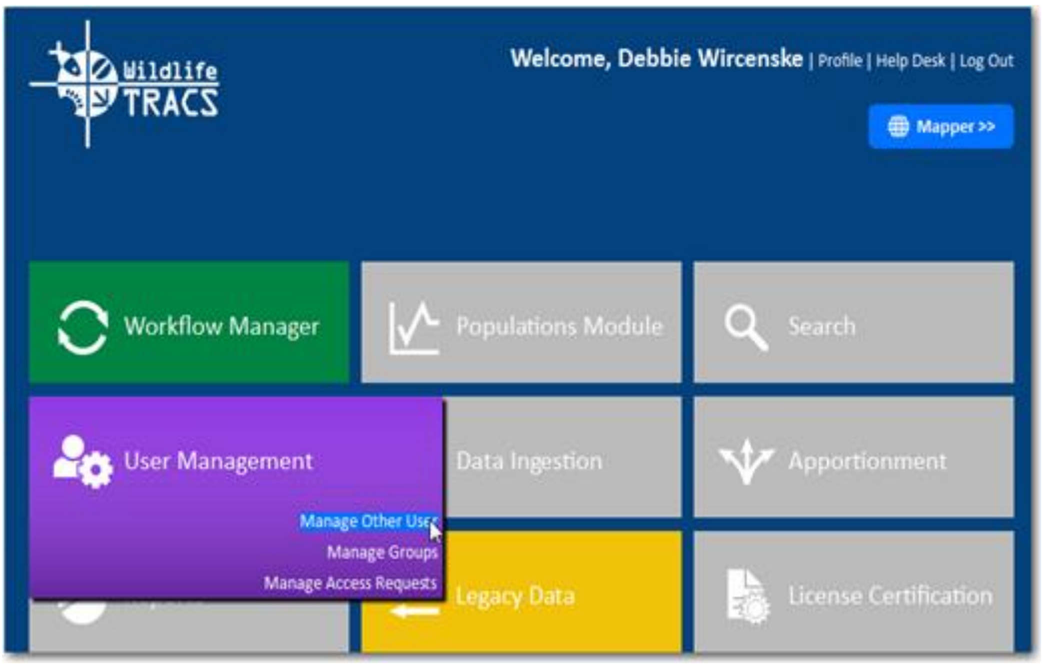
** **Note:** The **State Reviewer** and **State Approver** roles are still available in TRACS but no longer have any workflow steps. These state roles will be removed in future versions of TRACS.

Project proposals and performance reports go through an approval workflow in TRACS. The approval workflow allows a **state user** (editor, reviewer or approver) to submit a project for **federal review and approval**. The user administrator is responsible for assigning users to the correct role to complete their assigned tasks. TRACS permissions are hierarchical with each level above having the same access as the role below.

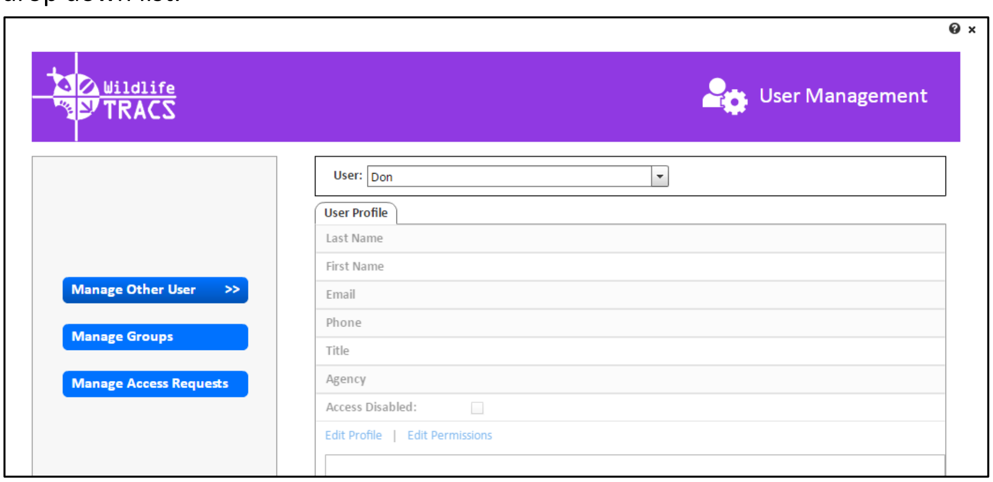
Manage Other Users (Edit User Profile & Permissions)

User Administrators are responsible for managing other user accounts within their assigned agency/division/region. The user administrator has access to edit user profiles and permission levels. (Note: Users can edit their own profile information and request additional access from the Profile tool).

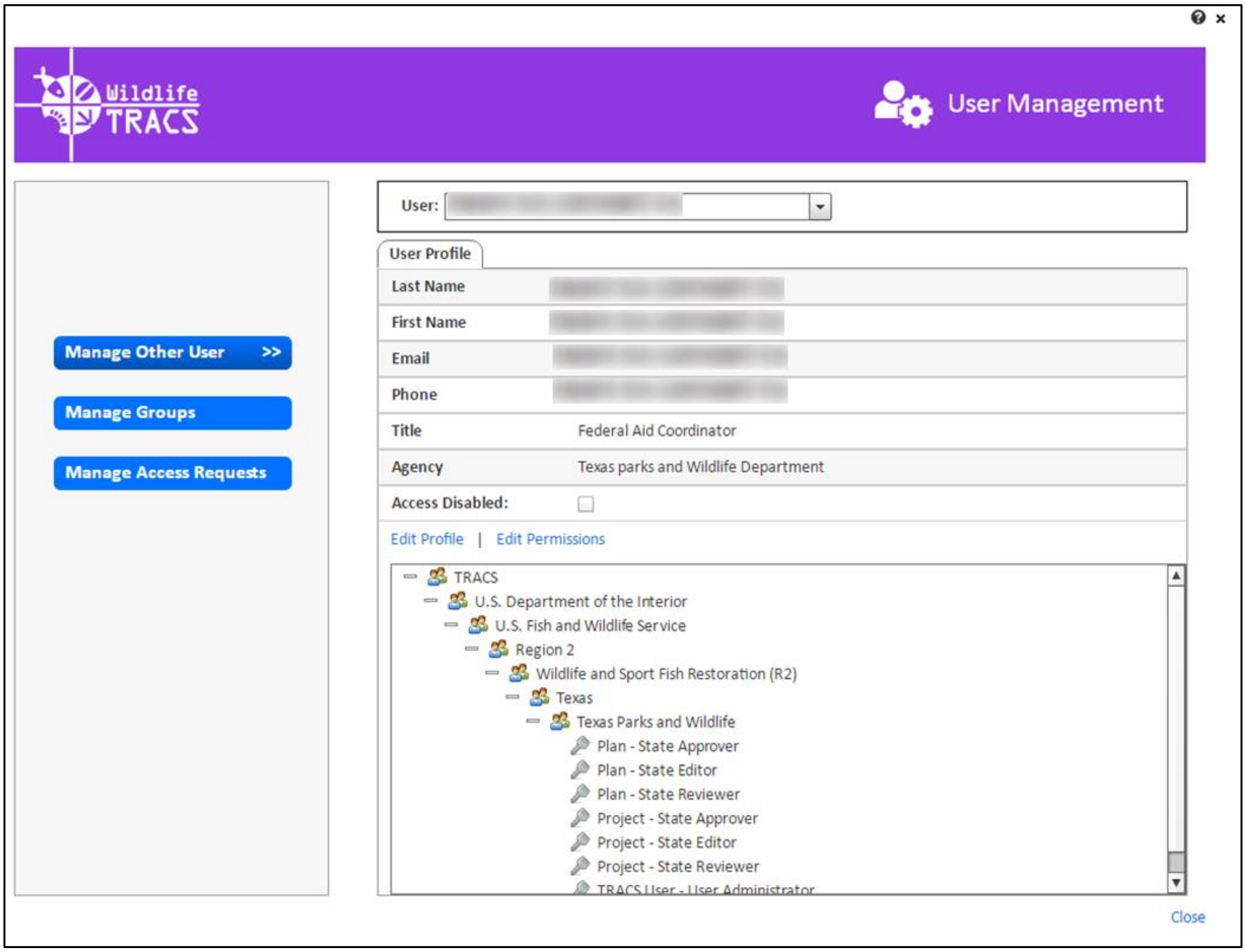
1. Select **Manage Other Users** from the **User Management** module.



2. Type the first three letters of the requesting user's first or last name. Select the user from the drop down list.

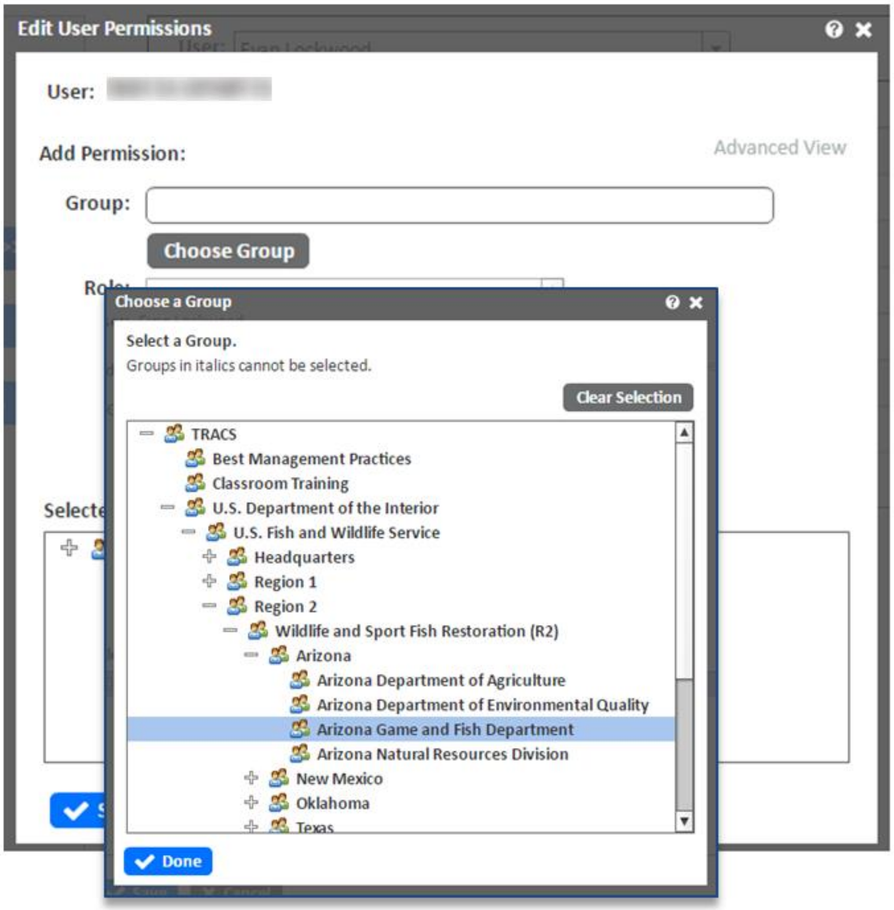


3. The user's profile will display. To view the user's permissions, click on the plus sign (+) next to TRACS and next to each sub-menu (agencies are nested in TRACS to show the hierarchy). Agencies display with the people icon and permissions display with the key icon.

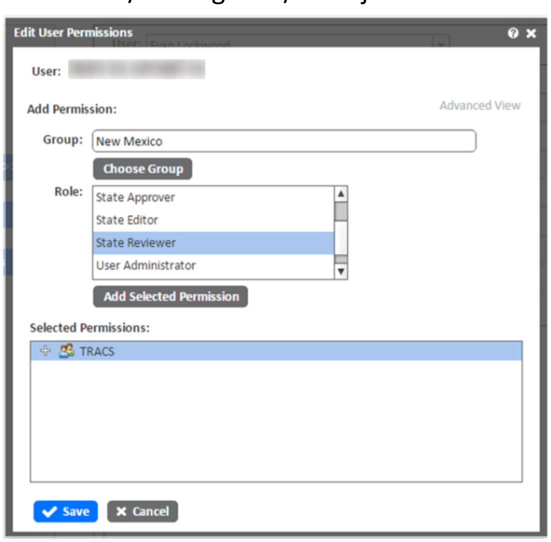


4. To edit the user's profile information click **Edit Profile**, make any necessary changes and click Save. (Note: Users can manage their own profiles through the Profile button on the Dashboard).

5. To edit their permissions, click **Edit Permissions**. On the Edit User Permissions window, click Choose Group. The Choose Group window will open. Select the plus sign (+) next to TRACS and each sub-menu to find and select the correct group. Then click **Done**.



6. Then select the role to assign to the user for that group and click **Add Selected Permission**. Add any other permissions needed, then click **Save**.
    - Click the Advanced View link if the requesting user requires access to a group outside his/her regional/state jurisdiction for a specific task.

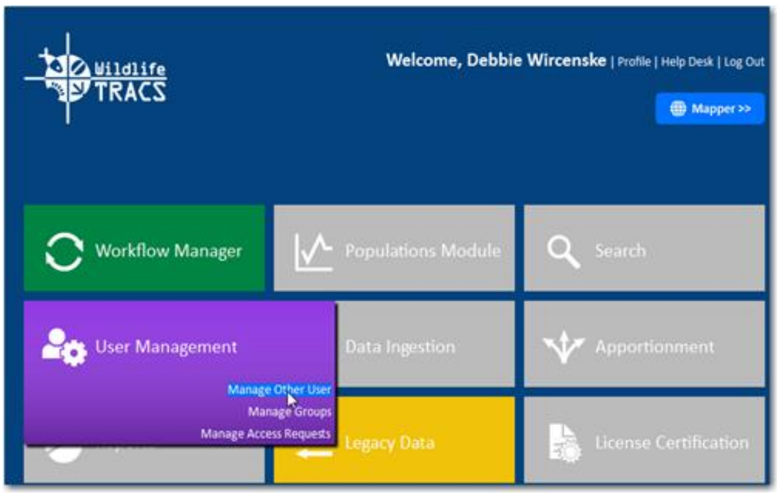


Disable a User Account

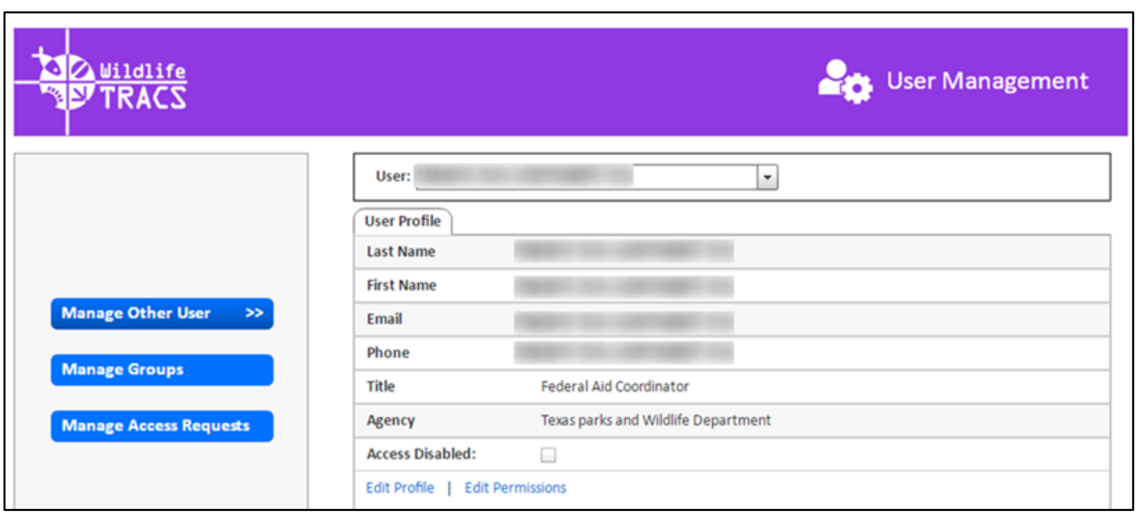
User Administrators are responsible for deactivating end-user accounts when access is no longer needed.

A user account that has been disabled can be reactivated by the User Administrator using the Manager Other User tool. The deactivated user does not need to submit a new access request.

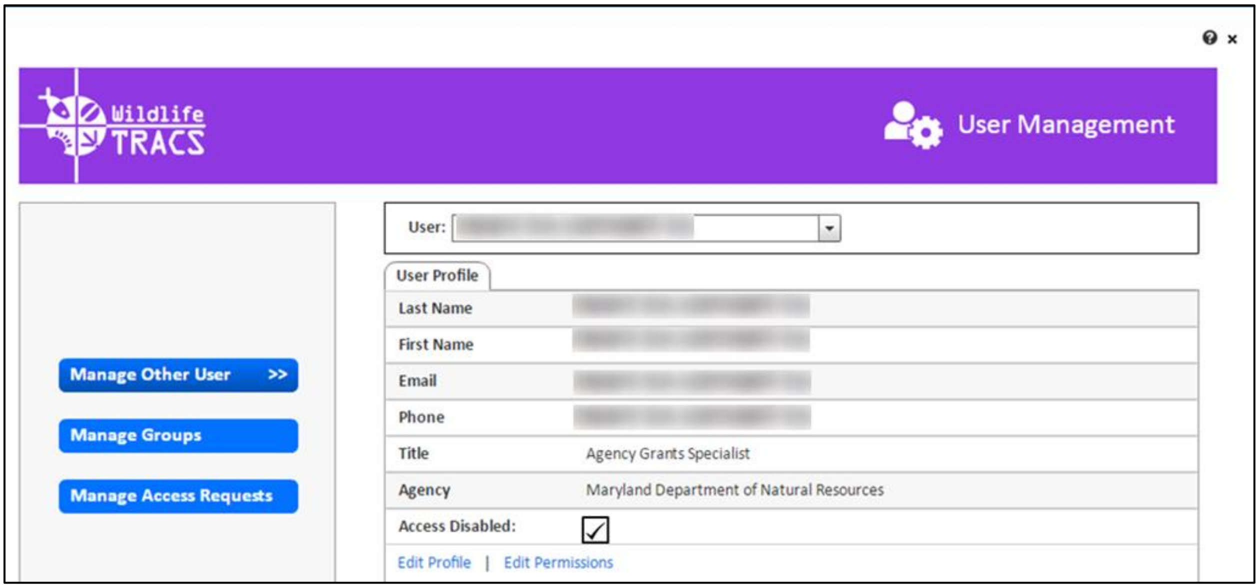
1. Select **Manage Other User** from the **User Management** module.



2. Type in first three letters of the user's first or last name. Select the applicable user from the drop down list. Click the **Edit Profile** link.



3. Check the **Access Disabled** box located below the **Agency** field. Click the **Save** button.



User Groups and Subgroups

Groups refer to an agency, division or regional office that has specific permissions with TRACS (e.g. Region 1). **Sub groups** are nested below another group in a parent-child relationship (e.g. Division of Aquatic Education, Department of Wildlife etc.).

Groups are hierarchical with a parent-child relationship and are displayed in a tree structure within each parent group. Group permissions allow users to enter or edit projects within their group (and sub-groups below them in the hierarchy).

This is important because users assigned to a parent group will have “inherited permissions” to enter or edit projects for all child subgroups below the parent group. Whereas users assigned to a child group will only have permissions to enter or edit projects for that group.

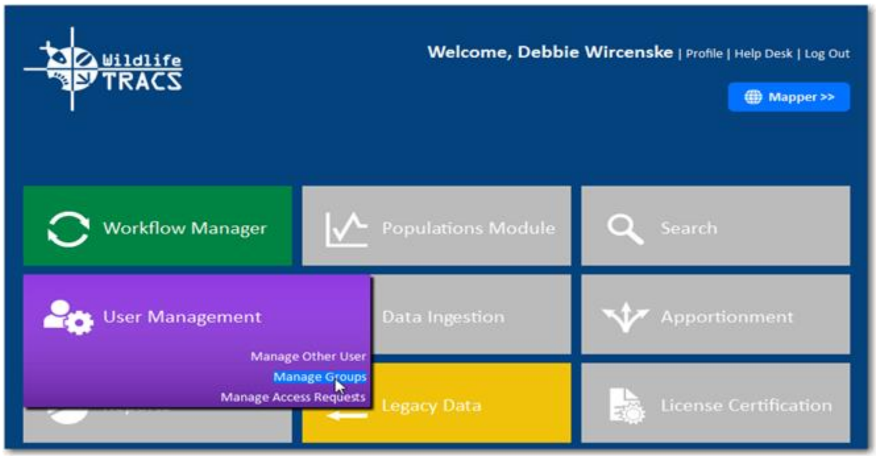
Troubleshooting Tips for User Administrators:

- Assign users to the appropriate group, keeping in mind that they will have access to enter or modify projects for that group and any subgroups below it.
- If a user is not able to access a project, it could one of two issues:
    1. The <u>user is not assigned to the correct group</u> so you may need to check their permissions.
    2. The <u>project is not assigned to the correct group</u>, in which case the user who created the project (or a user in the parent group) needs to change the group associated with the

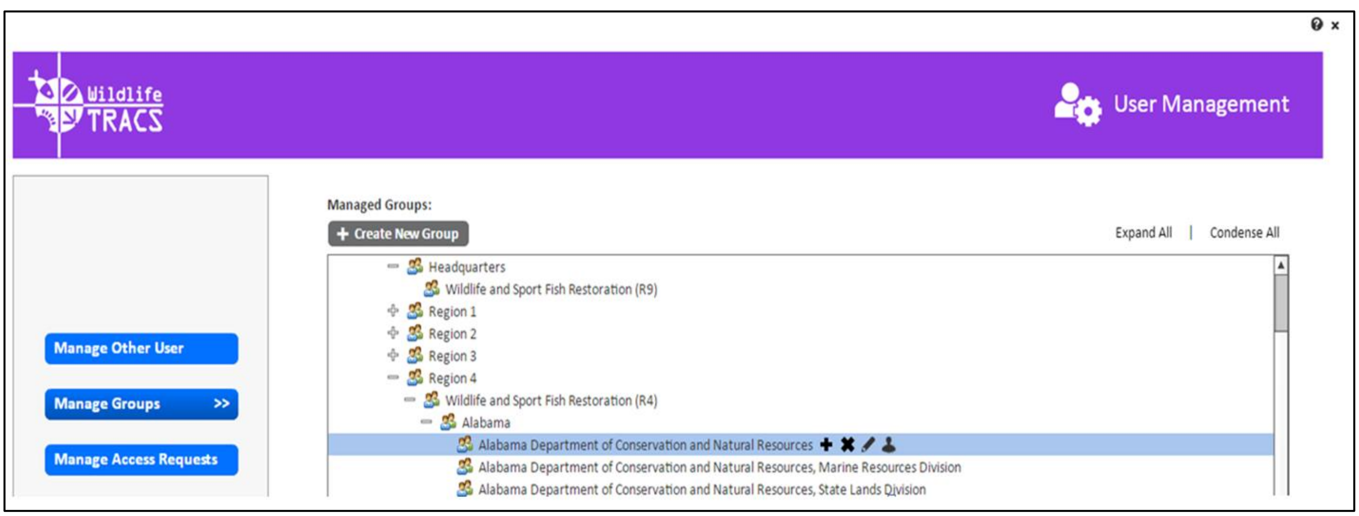
project to the correct group. See chapter 3. Defining your Project Properties (section on the Groups Tab at the bottom of the page) for more information.

To View or Modify a Group:

1. From the Dashboard, click on **User Management** to view a nested sub-menu to the right. Select **Manage Groups**.



2. The Manage Groups window opens. To view information about existing groups, click on the plus sign (+) next to TRACS and each sub-menu below it. (Tip: Use the buttons on the top right to **Expand All** or **Condense All**)



- When a group is selected, buttons will appear to the right.
  - ✚ Click the plus sign to create a new child group (or click on Create New Group at the top of the window).

- Click the X icon to delete a group (note: you will not be able to delete a group that has projects or users associated with it.)
- Click the pencil icon to edit the group information.
- Click on the person icon to view a list of users belonging to that group.

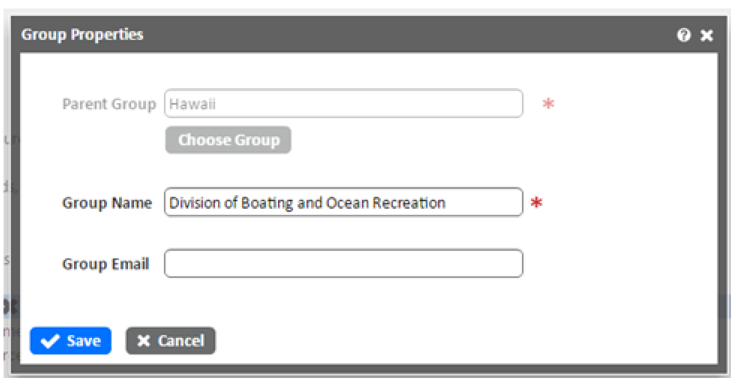
<u>To create a new group or sub-group:</u>

<u>Take care not to add a group that already exists!</u>

Select Create New Group at the top of the window or click on the plus sign next to a group in the table.

The Create A New Group window will open.

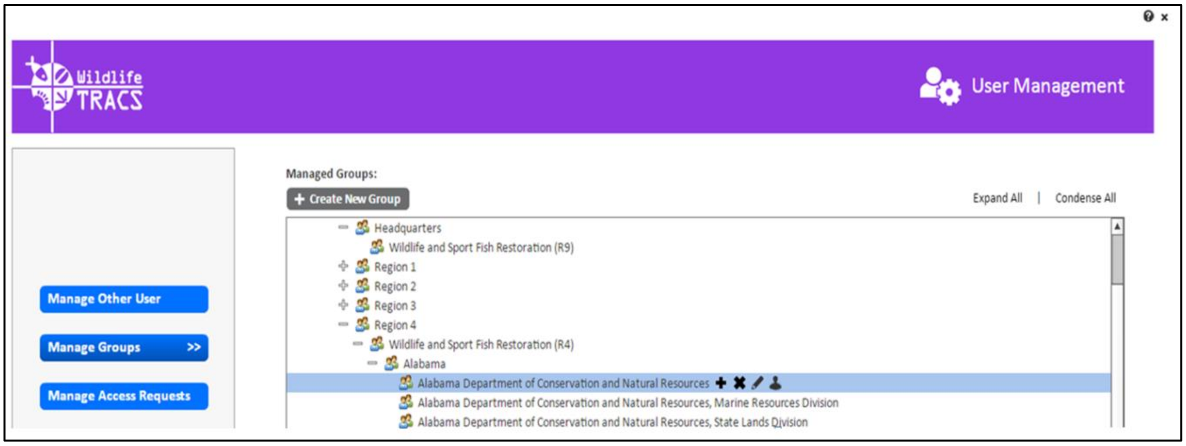
- Select Choose Group and click the + sign to expand sub-menus to select the Parent Groups (e.g. Hawaii)
- Type in the full group name and do not abbreviate (e.g. Hawaii Division of Boating and Ocean Recreation)
- Group email should be left blank (may be used for automated notifications in the future)
- Click the Save button



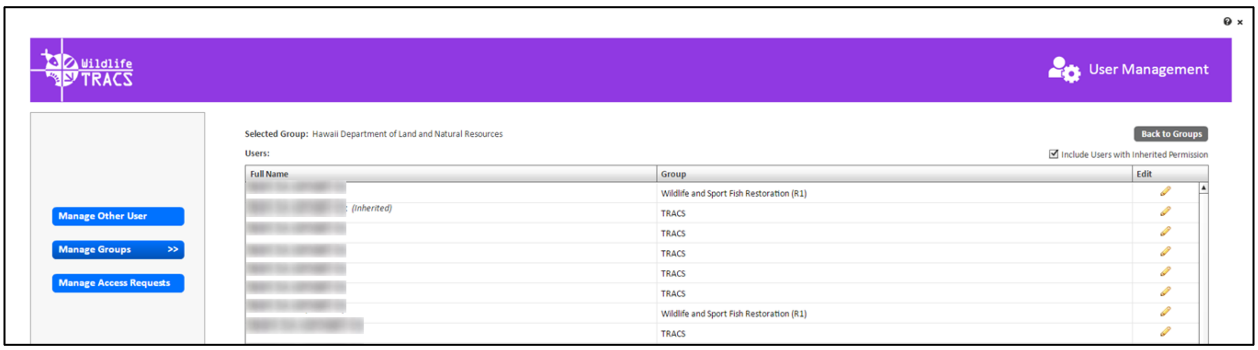
<u>To view a list of users in a group or sub-group:</u>

To view information about existing groups, click on the plus sign (+) next to TRACS and each sub-menu below it. (Tip: Use the buttons on the top right to **Expand All** or **Condense All**).

Then click on the person icon to view a list of users in that group.



A list of users belonging to that group will be displayed. Check the box in the upper right to include users with inherited permissions (inherited will display after their name). Click the pencil icon in the Edit Column to edit that user's profile or permissions.



Delete a User Group

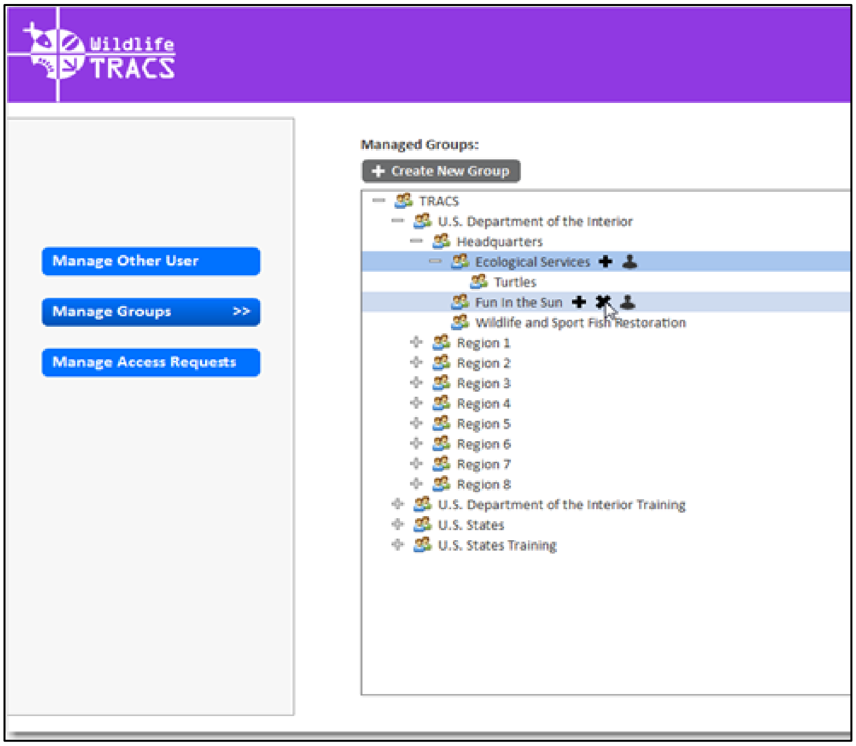
A group can be deleted by a User Administrator; however, a group cannot be deleted if user(s) are assigned to the group.

Select the **Manage Group** submenu from the **User Management** module in the TRACS Dashboard.

Select **Manage Other Users**.

Click the (+) sign to open all applicable groups and subgroups.

Click the delete symbol (X) located to the right of the group and or subgroup to delete the group.



The Delete Group warning message will appear. Click **Delete** to confirm.